UNIVERSITY OF BRISTOL

DOCTOR OF EDUCATION (EdD)

OVERSEAS STUDENT RECRUITMENT IN ENGLISH COLLEGES OF FURTHER EDUCATION

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ABSTRACT

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This dissertation is an examination of the recruitment of students from countries other than the United Kingdom onto courses offered in English colleges of further education. Whilst many of these students attend courses specifically designed for students from overseas, a significant number attend courses which are primarily intended for students from the United Kingdom. By concentrating on courses offered only in England and not on courses delivered overseas, and by isolating the research to only English colleges incorporated under the Further and Higher Education Act 1992, a sufficiently focussed topic for research could be identified.

The research consisted of an initial review of relevant literature. This located overseas student recruitment within the development of the further education sector in England and in the development of the quasi-market. It also examined relevant literature on marketing, the marketing of education and the recruitment of overseas students.

The research methods used included a postal questionnaire survey of all English, non-specialist colleges of further education with the assistance of the Association of Colleges (AoC), followed by four in-depth case study visits to colleges of further education all of which had experience of recruiting overseas students. During these visits semi-structured interviews were conducted with college governors and staff and a wide range of documentary evidence was examined.

A set of conclusions are reached and recommendations are made that are intended to assist senior managers in colleges to improve their effectiveness in recruiting students from overseas. The results of the research can thus be used to inform professional practice and to assist colleges who are either embarking on overseas student recruitment for the first time, or who are evaluating the effectiveness of their current overseas student recruitment activities.

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The Association of Colleges (AoC)

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Tim Hill (Dissertation Adviser)

Pam Smith (Proof Reader)

AUTHOR'S DECLARATION

I declare that the work in this thesis was carried out in accordance with the Regulations of the University of Bristol. The work is original except where indicated by special reference in the text and no part of this thesis has been submitted for any other degree.

Any views expressed in this thesis are those of the author and in no way represent those of the University of Bristol.

This thesis has not been presented to any other University for examination in the United Kingdom or overseas.

Signed: 

Date: 21.2.2001

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1 INTRODUCTION

The impetus for this research initially arose from the author's involvement with the recruitment of overseas students at Filton College in Bristol during the period 1987-1991. In two subsequent posts the author became aware of many colleges' lack of a detailed understanding of the process of recruiting overseas students and the significant amounts that colleges were investing in recruitment activities, often with few, if any, tangible results. Following the successful development of overseas student recruitment at Filton College, the author was asked to present papers at a number of conferences, including recruitment training events run for senior college managers by the Further Education Staff College (FESC), Network Training, the United Kingdom Council for Overseas Student Affairs (UKCOSA), the British Association of State Colleges in English Language Training (BASCELT) and a consortium of colleges recruiting overseas students and located in the South of England.

Interest in overseas student recruitment waned in further education colleges during the mid to late 1990s owing to financial and other pressures in the sector surrounding the incorporation of colleges and from the wide range of policy and managerial issues which the bulk of colleges were having to address post-incorporation. However, during the mid-1980s in a response to the significant financial efficiency gains colleges were having to achieve, an increasing number of colleges began to consider ways of increasing their non-Governmental funding. This was in part a response to the decline in the amount of funding for growth in student numbers which was available from the Further Education Funding Council (FEFC) but also a response to the need to

develop significant alternative sources of income to provide cash surpluses which colleges could then use to invest in their capital stock, specifically their premises.

The late 1990s were characterised by a number of concerns concerning the competing pressures within colleges to be both entrepreneurial and to develop new markets. From mid-1995 onwards concerns were being expressed in the educational press about some of the entrepreneurial activities in which colleges were engaging. Perhaps the most widely reported case which directly relates to this study concerns Halton College (McGavin 1998 and National Audit Office 1999a), where a range of overseas activities aroused the interest of both the Further Education Funding Council (FEFC) and a range of local interest groups. Whilst the activities at Halton College were not concerned with the recruitment of overseas students to study in the United Kingdom, they did concern a range of overseas related activities. The issues arising at Halton College, coupled with the requirement to observe more rigorous standards in public life following the last Conservative Government's concerns about probity in the public sector, presented colleges and other public bodies with a difficult conundrum - how to balance their entrepreneurial activities with the need for greater openness and accountability. Clearly, if colleges were going to engage in overseas recruitment activities and possibly a wide range of other activities generating income ostensibly from overseas sources, research needed to be undertaken and, wherever possible, models of good practice developed to provide guidance. This research is designed to concentrate on one small part of a

college's overseas activities; the recruitment of students from overseas onto courses taught in England. Despite the wide range of overseas activities in which colleges are engaged, the recruitment of students to courses offered in England was an activity which could be isolated and researched in some depth.

Whilst significant research was undertaken in the 1970s and 1980s in the area of overseas student recruitment to courses in the higher education sector (eg Belcher (1987) and Woodhall (1989)), not only had this research concentrated mainly on issues other than recruitment and marketing, but was also concerned with a very different sector of education. Whilst there are similarities between the further education and higher education sectors, particularly in the area of Higher National Diploma courses, the characteristics of these two sectors of education are so different that further education clearly merited its own research. The only previous research in the further education sector had been concerned with a range of operational issues and is now significantly dated (Ecclesfield 1987).

This research is intended to survey the current position in English colleges of further education in respect of overseas student recruitment and then provide guidance on good practice, issues that need to be addressed within the further education sector and suggestions for further research to inform professional practice. Many colleges appear to have embarked upon the recruitment of overseas students without any clear outcomes in mind and

often with an absence of detailed planning and preparation for what can be an expensive and time consuming exercise.

The research undertaken sets out to answer three specific questions but also offers the scope to identify other unanticipated outcomes and issues for further research. The research sought to collect data on the numbers and types of overseas students studying in England; to ascertain why colleges of further education had begun to recruit overseas students, and finally to determine what marketing and promotional methods were perceived by colleges as being the most successful.

Chapter 2 examines the literature available in the field of overseas student recruitment located within literature on the market and quasi-market, marketing, the marketing of educational services and finally the marketing of British education to overseas students. The further education sector has been adept over the years at adapting to changing requirements from Government and also at responding to a wide range of social changes which have impacted upon its course provision.

Chapter 3 describes the methodology used for the research and the research issues that had to be addressed. The research adopted the approach of using a quantitative questionnaire survey of the majority of English colleges of further education, followed by a small number of visits to colleges already recruiting overseas students, during which semi-structured interviews took place with key staff in the colleges. In addition, a range of documentary

evidence was examined and, where possible, interviews conducted with overseas students already enrolled on courses of study in England.

Chapter 4 reports and discusses the findings from quantitative questionnaire survey, from the semi-structured interviews and from the analysis of a wide range of documentation provided by colleges during the qualitative phase of the research.

Chapter 5 draws conclusions from the research findings and from the insights derived from the review of the literature. Recommendations are made for colleges who wish to develop their practice in the area of overseas student recruitment. Additionally, areas which would benefit from further research are identified.

The results of this research will inform work currently being undertaken by the Association of Colleges (AoC) to provide a guide of good practice for college managers who are either considering recruiting students from overseas or who are already doing so, but wish to evaluate their current marketing activities. With the Blair Government's announcement of increased enrolment targets for overseas students to both higher and further education institutions and the launch of the "brand" for British Education, a greater number of colleges will be considering entering the market for recruiting overseas students. Any research based advice available to colleges will be beneficial.

2 LITERATURE REVIEW

2.1 Development of further education

Hall (1990) charts four stages in the development of the further education sector; the period from the latter part of the last century until the 1944 Education Act, characterised by a voluntary system of mechanics institutes and technical schools; the period from the 1944 Act until the mid-1970s; the 1970s and 1980s, a period when further education went through significant changes in terms of the courses it offered and the types of students it attracted, and the early 1990s, characterised by the incorporation of colleges and the creation of the Further Education Funding Council (FEFC). For the purpose of this review, only the period of the development of further education since 1944 will be considered, but is split into five differently timed but distinct phases:

1944 - 1975	A period of stability with a focus on satisfying the education and training needs of industry and commerce
1975 - 1988	Major changes in the nature of further education colleges, the courses they offered and the types of students they attracted
1988 - 1993	The Education Reform Act and the beginnings of localised college autonomy
1993 - 1997	The incorporation of colleges and the creation of a national further education service

1997 – date The impact of the 1997 Labour Government and a return to centralised planning.

1944 - 1975

The legal basis of the current further education sector was defined in *The Education Act (1944)* in Sections 1, 7, 41 and 42 (HMSO 1981). Section 1 defined the responsibilities of the Secretary of State as being to work with Local Education Authorities (LEAs) in the delivery of education. Section 7 defined the three stages of education; primary, secondary and further, and Section 41 required each LEA to secure the "adequate provision" of further education in their area, that is full- or part-time education for those over compulsory school age. Section 42 of the Act required LEAs to produce a scheme for further education in their area to be approved by the Secretary of State. Further education was broadly considered to consist of three distinct elements; advanced further education (AFE) or courses of above A level standard; non-advanced further education (NAFE), courses of below A level standard, and recreational courses or non-vocational courses. The further education sector defined by the 1944 Act was delivered at local level by Local Education Authorities, but within a broad national policy framework. According to Stevenson and Thorpe (1981), the LEA could be seen as having seven main responsibilities in relation to their colleges of further education. The LEA made policy in the form of its scheme for further education, defining the general character for each of its further education colleges; had organisational influence on the way its colleges were governed and managed; had financial control in determining individual parts of each college's annual

budget; acted as landlord and builder, taking responsibility for the college's physical estate; acted as employer and negotiator, within a nationally agreed framework of pay and conditions of staff; acted in a judicial role, dealing with appeals and grievances, and finally ensured the academic development of its colleges. It should be remembered that until 1993 further education colleges had no legal entity of their own and could be seen organisationally as merely another department of the LEA. In the view of McGinty and Fish (1993), LEAs were supported by three main partners. Firstly, the 10 English Regional Advisory Councils (RACs) which were set up in 1947/8 by voluntary co-operation and funded by the LEAs. Their role, according to Cantor and Roberts (1979) was to regularly review further education provision to identify deficiencies and avoid duplication; to provide a forum for the exchange of ideas amongst FE professionals and between them and industry, business, Government agencies and universities, and to make known to interested parties the facilities available in colleges by publishing directories, reports and bulletins. Secondly the LEAs were also supported by a wide range of bodies awarding qualifications, such as the City and Guilds, London Chamber of Commerce and the Royal Society of Arts. Thirdly, LEAs were supported by HM Inspectorate who had the responsibility of ensuring, along with each LEA's own inspectorate, the standards of provision in individual further education colleges and in the sector as a whole. Two other organisations supported the development of the further education sector. The Further Education Staff College (FESC), founded in 1960 with the aim of improving the training and eventual job performance of managers in the sector, and the

Further Education Curriculum and Development Unit (FEU), founded in 1977 to stimulate curriculum development and innovation within the sector.

In the view of King (1976), further education was based upon two principles, voluntarism and consumerism. Voluntarism of provision was matched by voluntarism of attendance; the term "adequate provision" used in the Act was interpreted flexibly by LEAs and employers were under no obligation to send their employees to college on a day-release basis, even though the Act required it. The strong element of consumerism was characterised by colleges clearly focusing their course provision on the training needs of sponsoring employers and their students; in the view of Bristow (1970), the further education sector from 1944 - 1975 had as its clear focus the provision of courses, predominantly day-release courses, to satisfy the education and training needs of industry and commerce. A significant amount of colleges' work between 1944 and 1975 was in the area of AFE courses (Higher National Certificates and Diplomas) prior to the creation of the Polytechnics and Colleges of Higher Education and the reorganisation of teacher training/education in the early 1970s. A far smaller part of further education colleges' work was concerned with academic courses; A levels, O levels and CSEs, and with providing full-time courses as an alternative to schools' sixth forms. The 1960s and early 1970s in further education were characterised by Parkes (1982) as having two features; training initiatives separated from further education funded by Industrial Training Board (ITB) grants to employers and a concentration of effort and attention on higher rather than further education. The enactment of the *Industrial Training Act (1964)* had

placed further education colleges in the role of a direct provider of training, responding to Government manpower and training initiatives and ITB's sectoral needs through industry focused training programmes.

It would be unwise to assume that all colleges of further education developed in a similar way or were either equally responsive or unresponsive to the training needs of local industry and commerce or to Government manpower initiatives. Much depended upon the abilities of individual college management teams and the responsiveness and support of their respective LEAs. A major problem in characterising the further education sector is that there are as many similar characteristics between colleges as there are different characteristics which create the perception of a fragmented and disparate sector of education. "It is easier to define what further education is not rather than state what it is" (Farmer 1973:58).

1975 - 1989

The relative certainties of the period up to 1975 began to change as the result of external economic and employment changes affecting colleges' traditional markets for day-release trainees, and the activities of the Manpower Services Commission (MSC) formed as a result of the *Employment and Training Act* (1973). The role of the MSC, as described by Ainley and Corney (1990), later to incorporate the ITBs, could broadly be translated into three aims: abolishing the complete dichotomy between education and training that had emerged during the latter part of the last century; elevating the importance of vocational education and training, and attempting the complete overhaul of Britain's

education and training system. However, rising youth unemployment in the mid-1970s resulting, in part, from the decline in the country's manufacturing base, led to two key developments by the MSC. Following on from the report *Young People and Work* (MSC 1977) the MSC became directly and significantly involved in the range of initiatives to respond to rising youth unemployment as, in turn, did colleges of further education as the major provider of training for the MSC under those initiatives. A number of colleges had already had dealings with the MSC by providing college-based training under their Training Opportunities Scheme (TOPS), a scheme predominantly targeted at retraining adults aged 19 years and over. The MSC's initiatives to reduce youth unemployment presented colleges with a wholly new client group, with which many colleges and their staff were unfamiliar and, in many ways, ill prepared to serve. A bi-product of rising youth unemployment and the increasing numbers of 16 year olds staying in full-time education was a demand for colleges to offer a wider range of full-time courses, often in academic areas such as CSEs, O levels and A levels. Coupled with this, a decline in demand for traditional day-release courses led colleges to seek other areas of activity to replace those where demand had declined to a point where whole areas of course provision ceased to be viable. A case study by Hall, in Parkes (1988) on the challenges facing one large urban LEA, clearly demonstrated the difficulties faced by an LEA in responding to a significant and city-wide decline in demand for traditional, college-based, day-release courses. It indicated how ill-prepared the LEA was to respond to a changing market and how the whole structure of staff's terms and conditions and the premises in which courses were delivered made redeployment of staff and

change of curriculum difficult. However, perhaps the most significant force for change post-1975 was the perception, by the MSC, that further education needed to engage in a process of significant curriculum development in order to respond to the current and future training needs of industry and commerce and to respond to the skills needs of the new non-traditional students and trainees then entering further education colleges. It was also as a result of colleges' increased involvement in MSC-funded programmes that the Department of Education and Science (DES), at the encouragement of the MSC, formed the Further Education Curriculum and Development Unit (FEU). Blythe (1981) described the role of the Unit as being to review the further education curricula currently available and identify overlap, duplication and deficiencies; determine priorities for action, and suggest ways in which improvement could be effected; to carry out studies and curriculum experiments, and to disseminate information about the process of curriculum development to further education colleges. Blythe commented that the bulk of the FEU's early work was concerned with the 16-19 year old disadvantaged student group; the main future client group of the FE colleges. The FEU was, until it was eventually merged with the Further Education Staff College (FESC) in 1991 to form the Further Education Development Agency (FEDA), the only state-funded body responsible for encouraging curriculum development within the sector and encouraging colleges to respond to the new training challenges presented by trainees on MSC funded programmes.

The involvement of the MSC in the further education sector was to have a marked impact on it; they were a major customer of and contractor with

colleges and soon began exerting a significant influence on the sector. In many cases, contracts for TOPS courses and youth unemployment initiatives were the first time colleges had enjoyed the proceeds of training contracts as a resource which they could use flexibly to supplement their LEA funding. The result was that the MSC began to form opinions about the FE sector, according to Woollard (1985). These included a concern that colleges did not adequately promote their courses to potential consumers, which left many school leavers unaware of, or apathetic about, what was available at their local college; that trainees attending MSC-funded programmes in colleges were often treated as second class citizens, being taught in the least attractive facilities and by the least experienced staff, and that college administrative structures were still geared towards a traditional academic year and not the 48 week training year now favoured and, in many cases demanded, by industry and commerce.

In 1980, following the report of a Department of Education and Science (DES) working party (DES 1979a), the requirement for LEAs to produce schemes for their further education provision was withdrawn. This change to the requirements of the 1944 Act perhaps signalled the more significant role which the MSC would play in the future strategic planning of further education colleges. In 1981 the MSC produced its *New Training Initiative: An Agenda for Action* (MSC 1981). The key theme of the document was the need for the country to develop a flexible, adaptable workforce to cope with the changing economic climate. The three objectives of the strategy were to develop effective skills training; equip all young people for the world of work, and to

widen opportunities for adults to re-train. The White Paper *Training for Jobs* (HMSO 1984), planned to give the MSC that significant role, including a major influence on the future development of the further education sector, and expanded the MSC's role to that of a national training authority, according to Ainley and Corney (1990). The objectives of the White Paper *Training for Jobs* were to secure the better preparation in schools and colleges for working life and better transition from school and college to work; the modernisation of training in occupational skills, particularly the reform of the apprenticeship system, and the widening of training opportunities for adults to acquire or improve their skills. These crucial objectives sought to address the deficiencies in further education colleges, and skills training generally, perceived by the MSC, namely the lack of a national policy on the role of further education; insufficient marketing of further education provision, and insufficient flexibility in both modes of attendance and the length of the college year. One of the original proposals in the White Paper was for the MSC to directly fund, taking over the role from the LEA, all non-advanced further education (NAFE) provision. However, when this recommendation was implemented it had been diluted and it was agreed that the MSC would fund only 25% of all college-based NAFE provision in LEAs and in association with their colleges would produce LEA-wide NAFE development plans. This process, in turn, required colleges to produce their own institutional development plans in collaboration with their LEA; effectively the MSC became a minority "shareholder" in all FE colleges (Farley 1987). Whilst in many cases this planning exercise initially had a limited impact, the MSC did encourage LEAs to rationalise curriculum provision that was undersubscribed

and seek to address areas where demand for courses outstripped the numbers of places available. In 1986 Government published another White Paper, *Working Together: Education and Training* (HMSO 1986), which set out radical plans for a review of the UK education and training system. The focus of this White Paper was a greater partnership between the providers and users of both education and training and incorporated the recommendations of the *Review of Vocational Qualifications in England and Wales* (HMSO/NCVQ 1986). The Review had, in turn, been set up as the result of another White Paper, *Education and Training for Young People* (HMSO 1985). The Review had concluded that the existing system of vocational qualifications lacked a clear and readily understandable pattern, while suffering from both considerable overlaps and gaps in provision. The precursor to this White Paper had been a 1984 survey of vocational education and training systems in three countries with successful economies, *Competence and Competition: Training and Education in the Federal Republic of Germany, the USA and Japan* (NEDC/MSC 1984). The report pointed to the correlation between greater investment in vocational education and training and its impact on the economic performance of the UK's main industrial competitors. The conclusions of *Competence and Competition* were enshrined in Government policy *in Education and Training for Young People*, expanding the existing youth unemployment measures to a two year training guarantee for all unemployed 16 year olds and providing for recognised qualifications to be taken as part of youth training. The fundamental review of vocational qualifications was long overdue with, in 1985, over 600 bodies awarding qualifications and about 6 000 individual vocational qualifications

being available. The 1986 review of vocational qualifications led to the setting up, in October 1986, of the National Council for Vocational Qualifications (NCVQ). The formation of the NCVQ led to a gradual but significant change in the curriculum portfolio each college of further education was to offer. Whilst the NCVQ only had responsibility for vocational qualifications and did not act as an examining body themselves but approved other examining bodies' qualifications, many of the practices they encouraged were to have a positive effect on the quality of more academic courses and qualifications offered in further education colleges. The NCVQ's work tied in with the move away from time-served apprenticeships towards the achievement by students and trainees of a range of competencies, capable of being assessed in either a college of further education or in the workplace and externally verified, rather than requiring students and trainees to obtain a qualification based upon the number of years of study they had completed with the final assessment being by formal examination.

Another initiative in the mid-1980s aimed at encouraging colleges to make their provision more relevant to the needs of industry and commerce was that of PICKUP (Professional, Industrial and Commercial Updating) a DES initiative (FEU 1987). A team of Regional Development Agents based at the appropriate Regional Advisory Council (RAC) were charged with working closely with colleges, LEAs and employers in stimulating and developing short, tailor made courses for local businesses priced to employers at a realistic market rate with, in the case of most LEAs, any trading surpluses generated being retained by the college providing the training to supplement

their core LEA funding. The *Further Education Act 1985* (HMSO 1985) acted as a precursor to the *Education Reform Act 1988* leading to the eventual incorporation of colleges. It gave them the power, provided that their LEA was in agreement, to set up separate trading companies in which to administratively and financially locate all of their course provision and other services provided and which generated income from sources other than their LEA. Such activities as MSC contracts for adult retraining and youth training and PICKUP training for employers could be located within the college company for administrative ease and any surpluses generated covenanted back to the college so as to avoid the payment of Value Added Tax (VAT). Whilst there was an early interest in the opportunities offered by the 1985 Act, only a relatively small number of colleges eventually set up their own trading company, either because they could perceive no material benefits from such a move or because their LEA prohibited such pre-incorporation autonomy. The increasing number of contracts for training being awarded to colleges coupled with the provisions of the 1985 Act did give them the incentive and the administrative facilities to begin generating sources of income to supplement their LEA funding and diversify their income base. In many LEAs, colleges were able to exercise significantly wider control over these sources of income than they could over their LEA funding.

Two major reports which were to shape Government thinking and the future of the further education service, but which were administratively and financially rather than curriculum driven, were *Obtaining Better Value From Further Education* (Audit Commission 1985) and *Managing Colleges Efficiently*

(DES/LAAs 1987). These reports examined the whole productivity of the sector, from staff/student ratios to improving management information systems and indicated very clearly that greater productivity could be obtained from the sector. However, where one of the reports was to have most impact was in the area of marketing, re-iterating the MSC's view that colleges were not adequately or successfully marketing their courses and services to potential clients.

A telling quote from Parkes characterises the previous decade, "Change has taken place: change in the role of the lecturer, in his place of work, in the courses he teaches and in the student he relates to" (1982:86).

By the mid 1980s there was a growing perception amongst Government and commentators that, for further education to respond in an even more marked way to changes in the employment market and demands for courses from potential students, more significant organisational and managerial changes were needed. There had been employer-driven changes leading to major curriculum innovations and greater college responsiveness to the market. There had been administrative changes and the encouragement of colleges to respond to new training needs and, in turn, generate new sources of income. However, more was needed. This view tied in with Government initiatives in other parts of the public sector: the health service, housing and the social services, where the moves towards decentralisation and devolution of managerial authority were being implemented.

1988 - 1993

The changes which affected the sector following the enactment of the *Education Reform Act 1988* (HMSO 1987) concerned three main areas: the composition of college governing bodies, determining their greater powers and privileging business and industry members to a minimum of 50% of the total membership and reducing the LEA members to a maximum of 20% of the total membership; the delegation of financial and other managerial powers to the governing body, in the form of a delegated budget as a single sum of money derived on the basis of a formula and related to the numbers of students recruited annually, and greater control over the appointment and dismissal of staff. The future role of LEAs in relation to colleges would, according to Graystone (1988), be to regulate the service locally through financial controls; to co-ordinate and lead the service locally, and to provide advice and support for colleges. Key unresolved issues surrounding the *Education Reform Act (ERA)* were the balance between LEA planning and delegated powers to governing bodies of colleges; the future relationship between a college's principal and the new, more powerful governing body; the confused relationship for staff, with the LEA remaining as the employer but the governing body having power of hire and fire, and the long term impact on the curriculum, particularly the future of advanced further education work in colleges. Commenting on the impending enactment of the ERA, Farley (1987) bemoaned the lack of administrative and professional resources that LEAs had been prepared to devote to further education which, in his view, may have stemmed from council members' parochial concerns and partisan electoral calculations. Farley saw LEAs as having been reluctant to realise

the rapid changes that were taking place in vocational education and training, but he was also acutely aware of the need for LEAs to still exercise some strategic planning function if colleges were to be granted more independence.

Although, according to Elliott (1996), the ERA focused primarily upon the schools and HE sectors, it significantly prepared the ground for the eventual incorporation of colleges. A major concern, to be addressed later by the *Further and Higher Education Act 1992* (HMSO 1991), was that colleges' levels of funding were still being determined at an LEA level and did not take account of any perceived necessary level of funding per full-time equivalent FE student, other than as a result of recommendations of the Council of Local Education Authorities (CLEA). All the new powers conferred by the ERA would be exercised within a local framework, with each college still accountable to its LEA and with the LEA performing an over-arching role of post-16 education planner of both secondary and further education on a local basis. Whilst colleges would be given significant freedoms from the controls of the LEA, each college would still be operating within a local context and as part of a locally administered service. The aims of the ERA, according to Turner and Chitty (1990), were to make the further education service more responsive and accountable to the market, to make further education more efficient, to raise standards and quality, and to respond to the Audit Commission report *Managing Colleges Efficiently* (DES/LAAs 1987). More importantly preceding the Act, the chance of corporate status, incorporation, was referred to obliquely in the *Education Reform Act 1988* (HMSO 1987) and was clearly portrayed as something the Government wished to encourage.

Perhaps the most major of the changes in the ERA was that concerning college governing bodies and the greater powers they would now assume in the future academic direction of their college. Prior to the ERA the role of the governors was to rubber stamp decisions made elsewhere within the LEA and to support, but not actively contribute to, the making of college policy, according to Charlton, Gent and Scammells (1971) and Tipton (1973).

In *Towards a Skills Revolution* (CBI 1989) the Government was encouraged to consider setting national targets for education and training. This led to the White paper *Education and Training for the 21st Century* (DES 1991). The CBI report and White Paper led to the Government adopting a series of National Education and Training Targets (NETTs) to which colleges and the newly created Training and Enterprise Councils (TECs), which had replaced the MSC, would all be encouraged to work. If the targets were to be successfully achieved, the further education sector would have an important role to play and therefore needed to be as ready as possible to respond to the challenge. Whilst the TECs would be intimately involved in delivering the NETTs, their role would be as a stimulator and funder of training but not as a training provider. The role of training provider was to be that of the further education colleges, other state funded training organisations and private training organisations.

1993 - 1997

The final major legislative change to have been enacted in relation to further education was the *Further and Higher Education Act 1992* (HMSO 1991),

which led to the incorporation of colleges and the creation of the Further Education Funding Council (FEFC) as the sector's funding and regulatory body. Whilst the accepted view is that the incorporation of colleges was about increasing efficiency and responsiveness to colleges' customers, others, for example Flint (1994), proposed different reasons for incorporation. Flint's view is that incorporation was in part about "biffing" the LEAs, possibly stemming from the fact that further education was also a low priority on an LEA's list of priorities when compared to the needs of primary, junior, secondary and special schools. He also maintained that incorporation was about freeing colleges up from historical constraints and the administrative beaurocracy of the LEA, and additionally that it was about letting "market forces rip". In his review three years after the Act, Elliott (1996) considered that there were at least five major system-changing effects of the 1992 Act. It overturned the role of the LEA and allowed colleges to respond more actively to market forces; it finished the job of the ERA and moved colleges in the same direction as the incorporated polytechnics and colleges of higher education; it created a national system of further education funded by a quango; it significantly weakened a part of the schools sector by incorporating the sixth form colleges, and it introduced the concept of convergence of funding with the aim of funding all colleges at the same rate per unit of activity by the year 2000/2001. Stubbs (1995) and Crequer (1995) identify several key features of the national system of further education set up under the 1992 Act. A national system of funding further education was put in place supported by a strategic planning framework for colleges. However, until 1997/8, three years after incorporation, colleges were not required to consult

their former LEA about their strategic plan and any implications for partnership/competition with local schools. An inspection framework specific to the FE sector was set up with each college being inspected every four years and with data being published on performance of students and colleges. Growth was to be encouraged (25% in total student number terms) over the first three years of the new sector enabling some colleges, who under their former LEA had received no funding to increase student numbers, to respond to increasing demand, and to achieve considerable growth. A feature not identified by either Stubbs (1995) or Crequer (1995) was the incorporation into the FE sector of the former sixth form colleges. These colleges, generally smaller than their former FE counterparts, were a late inclusion into the list of institutions to be incorporated and would not have, certainly during the 1960s and 1970s, been seen as natural partners with the former FE colleges in the new sector. The main impact for individual colleges from incorporation was the corporate status accorded to the college and the ability, within a more flexible but increasingly accountable framework, to manage their own affairs and determine their own strategic direction, responding to their local market as they saw fit.

Whilst the creation of a coherent national FE sector has raised its profile in the eyes of policy makers, the media, employers, parents and potential students, the severing of links with LEAs has resulted in a breaking down, in many cases, of productive local partnerships. It also brought into sharp focus the inequities in funding between neighbouring colleges and has also highlighted the often unsuitable locations of colleges which were based upon old LEA

boundaries rather than upon centres of population, employment or consumer demand. Bradley (1996) quoting Birch et al (1990) commented on the lack, prior to incorporation, of either a national standard of FE provision required of each LEA, the lack of a standard formula for funding LEA's provision of FE, and the differing levels of funding each college was allocated based purely upon geographical location or historical precedent. In effect, the FEFC became after incorporation the country's only LEA, as far as further education was concerned. The breaking down of the former national pay and conditions for staff in colleges has enabled each individual college to determine a range of pay and conditions appropriate to its needs and to enable it to respond to its local market in the most effective way possible. However, one of the most disturbing bi-products of incorporation has been the disruption to harmonious staff relations brought about by the pressures of convergent funding, the need to respond more flexibly to market demand and the need for even the most efficient colleges to effect year on year efficiency gains.

Gleeson (1994) saw the *Further and Higher Education Act 1992* (HMSO 1991) as satisfying two governmental ideological objectives. It firstly broke the public service element of further education and severed FE's links with the LEAs. Secondly, it ended the previous administrative arrangements and placed further education in a new market arrangement unfettered by local bureaucracy and able to respond more effectively to local market needs. However, he also characterised the further education sector as being one that had developed within a patchy framework, had operated against a national

background of under-funding and low participation and had been neglected in policy terms.

1997 – date

The period since 1997 and the election of the Labour Government has been one of unprecedented activity in, and concentration on, the further education sector. Three themes have characterised the period since 1997; Lifelong Learning, proberty in public life, and Government's relationship with colleges of further education evidenced by the Review of Post-16 Education and Training.

The Labour Government pledged themselves to create a further education sector, where the unfettered quasi-market forces set loose by Incorporation were brought under control, in a climate of partnership and collaboration.

Towards the end of the Conservative administration, the FEFC had commissioned The Kennedy Report, *Learning Works* (FEFC 1997a), which sought to propose a strategy to turn Britain into a learning society, where lifelong learning became an experience for the many, rather than a privilege for the few. There was a clear perception that many colleges of further education were still catering for largely traditional types of students and had yet to form meaningful relationships with the disadvantaged, those who had poor experiences of compulsory education, and large sections of society who

never benefited from any further or adult education post-16. The Labour Government's response to the Kennedy Report came in three parts, launched simultaneously. *The Learning Age* (DfEE 1998d), *Further Education for the New Millennium* (DfEE 1998b) and, not of specific interest to this research, *Higher Education in the 21st Century* (DfEE 1998c). *The Learning Age*, in addition to heralding the launch of Individual Learning Accounts (ILAs), the University for Industry (UfI) and setting targets for lifelong learning, did propose an agenda of partnership. *Further Education for the New Millennium* also focussed on partnership as the vehicle for delivering the lifelong learning agenda. All three documents were intended to be the first stage of consultation about the new Government's agenda for further education, but contained only limited firm proposals. Following consultation on *The Learning Age*, the Government announced the formation across the whole of England of Strategic Lifelong Learning Partnerships; groups formed which consisted of representatives of colleges, Training and Enterprise Councils, local authorities, voluntary groups and private training providers, to work together to increase lifelong learning. Strategic Lifelong Learning Partnerships are intended to be of a smaller geographic size than training and enterprise council regions, but larger than Local Education Authority regions. At the time of writing, only a small number of the partnerships have been formally constituted, and an even smaller number are having any significant impact on their geographic area.

At the same time as the launch of the three reports referred to earlier, the DfEE published a consultation paper *Accountability in Further Education*

(DfEE 1998a). This report invited comments on the future structure of college governing bodies, proposing a reintroduction of an LEA involvement and of a greater community involvement in the governance of colleges. The so-called democratic deficit which this proposal was set to address had been caused by colleges no longer having by statute to have Local Authority representation on their governing bodies.

Although there had been reports early in the life of the FEFC concerned with the inappropriate governance and management of two colleges, from 1986 onwards a range of reports from both the FEFC and the National Audit Office (NAO), began to raise serious questions in the mind of Government, about the robustness of governance arrangements, and also management arrangements, in the further education sector. Reports concerning Halton College (FEFC 1998d and NAO 1998a), the Gwent Tertiary College (NAO 1998b), and St Austell College (FEFC 1997b) were published, in addition to highly critical quadrennial inspection reports for Wirral Metropolitan College (FEFC 1998g), Matthew Boulton College (FEFC 1998f) and Bilston Community College (1998c). The focus of many of the reports was on the impact of the quasi-market in further education and the excessive zeal with which some colleges had attempted to maximise their funding from the FEFC and other sources, often using highly questionable methods of running the college. The views of these reports were backed up by the *Sixth Report of the House of Commons Education and Employment Committee (HMSO 1998)*, which also highlighted a range of issues affecting the further education sector stemming from the freedoms created by Incorporation, and some

colleges' willingness to circumvent their Instruments and Articles of Government. Of particular concern at Halton College and specifically relevant to this research, was excessive expenditure by the college, without proper internal approval, for a range of international activities which the college was either currently involved in, or was planning to develop. The FEFC and NAO reports have led to a significant tightening of the rules and procedures surrounding a range of expenditure into which colleges can enter, but specifically colleges' expenditure on and involvement in international activities. The FEFC have provided colleges with detailed guidance on such issues as college companies, joint ventures in England and overseas, and overseas activities in general. The main aim of the FEFC has been to ensure that proper internal approval is obtained for expenditure on international activities which should lead to taxpayers' money not being spent on spurious international activities which, in turn, generate no real benefit to the college specifically or the state in general.

However, this has resulted in many colleges being confused by what is perceived to be a mixed message being given by Government. At the same time as introducing a range of restrictions on the overseas activities in which colleges can become involved, Government has launched a high profile initiative to attract more overseas students, in both further and higher education, to study in the UK. The plan is to double the numbers of overseas students studying in further education from approximately 25 000 to 50 000 by the year 2005, generating an additional £200 million in new export earnings. In addition to providing additional funding to The British Council to develop a

brand image for British education, visa arrangements will be streamlined, better information will be provided through The British Council to potential overseas students, and overseas students will be able to work whilst in the UK and will not have to keep re-applying to stay in the UK after each year of study. Also, The Chevening Scholarship Scheme, which mainly affects higher education students, will be extended. However, it is important to note that colleges wishing to recruit more overseas students and benefit from the initiative will have to fund any additional institutional marketing activities from their own budgets and will not be able to access any direct Government funding to support the promotion of their own institution.

The final initiative proposed by Government has been the early stages of a fundamental review of post-16 education and training. The initial consultation document *Learning to Succeed* (DfEE 1999a) was published in June 1999 and proposes a range of changes to the way post-16 education and training is organised and delivered. Early indications are that Government may change significantly some of the proposals in the report and any early detailed analysis may be premature. However, some of the key features of the report are likely to remain unchanged. The FEFC would be replaced by a National Learning and Skills Council, supported by between 40 and 50 Local Skills Councils. The National Council would assume funding responsibility for all further education and vocational training programmes currently funded by the FEFC, and responsibility for funding the Training and Enterprise Councils. However, both the FEFC and the TECs would disappear. Although Government has made only an oblique reference to the funding of sixth-forms

in schools, one possibility is that the funding of post-16 school provision would also become the responsibility of the National Council. Consultation on *Learning to Succeed* continues until Autumn 1999, when firmer proposals will be published.

The Government's further education initiatives since 1997 leave colleges in a particular dilemma. Colleges' annual recurrent funding on which their annual operating budgets are built are, in large part, generated by competitive activities. A college survives by recruiting its target number of students against competition from neighbouring colleges, schools and private training providers. To attract marginal funding to develop other smaller, but none the less important activities, colleges have to work in partnership with other providers on a Local Authority, TEC, or Strategic Lifelong Learning Partnership basis. Further, colleges are still being encouraged by the FEFC and the DfEE to increase their income from non-Governmental sources by providing training for local businesses, engaging in commercial activities and, as the latest Government initiative to recruit more international students indicates, increase the volume of their international work. Finally, if the outline proposals of *Learning to Succeed* come to fruition, the local Learning and Skills Councils will have the power to decide on the local provision of education and training, possibly recommending the transfer of courses between institutions, the development of new courses and deciding whether individual colleges of further education should merge.

At a superficial level, further education is moving away from the largely unfettered quasi-market of Incorporation to the regulated market reminiscent of the period pre-1993, when further education was regulated by Local Education Authorities. Effectively, Government has not reconciled whether it wishes colleges to operate in a wholly competitive environment, a collaborative environment, or a combination of the two. If it is the latter, this presents significant difficulties for colleges. After a significant six-year period of quasi-market competition, returning to a collaborative environment will present colleges and their management teams with a changed agenda and the need to re-focus their college towards a new way of working.

2.2 Quasi-Markets

The quasi-market is a mechanism which has been used from the late 1970s onwards to encourage state funded services to respond to consumer needs and to encourage professions, such as teaching, medicine and the law, to respond to consumer preferences. A bi-product has been a reduction in the perceived power and status of those professionals and a perceived greater responsiveness to the needs of the client.

The vast bulk of the writing on markets in education has concentrated on the schools sector, with very little consideration being given to markets in further and higher education. Given that the further education sector has, in large part, achieved the status of a market driven service since Incorporation, this is surprising. Before embarking on a review of markets in further education, an education market must be defined. The markets that have been created in education and further education should, according to Le Grand and Bartlett (1993), properly be termed quasi-markets as there are a number of factors which differentiate them from true, free markets. Bash and Coulby (1989) characterise a free market as including a number of conditions: that there are both buyers and sellers; that these buyers and sellers have perfect knowledge of market events; that the product or service is the same everywhere; that buyers and sellers operate independently and that sellers are able to leave production or are able to supply whatever is needed to meet demand. In the public sector in general, and in education in particular, it would be difficult to satisfy all of these criteria, which has led to the creation and growth of what

are known as quasi-markets. These quasi-markets have affected not only education but the health service, housing and social services, amongst others. The characteristics of these quasi-markets, as described by Le Grand and Bartlett (1993), is that the state financing of the service is retained, but the system of service delivery has changed radically, usually featuring a decentralisation of decision making and the introduction of competition in the provision of the service. Another characteristic of a quasi-market is an emphasis on efficiency, specifically productive efficiency, and the relating of the cost of providing the service to the quality of the service provided. For example all Office for Standards in Education (OFSTED) school inspection reports have to make specific reference to whether the school is providing value for money. Responsiveness of the service to the clients is also a feature of a quasi-market requiring providers to respond flexibly to their clients' demands. A third characteristic is choice; a choice between alternative providers of the service and a choice between the type of service purchased. In the education sector, quasi-markets have had as their main aim, according to Le Grand and Bartlett (1993), the reallocation of resources to successful providers and the increase of parental choice in their child's education, creating a system where the provision of high quality education is financially rewarded. In some cases of quasi-markets, including further education, a state agency has continued as the principal purchaser using a voucher or entitlement as the means of enabling the potential users to access the service. However, the users of the service are not able to purchase the service from whoever they want; those macro purchasing decisions have already been made by the state.

The origins of the quasi-market in the public sector and specifically education come from two main bases. Firstly, the writings of free market Austrian economists including Hayek (1944a/b), which proposed the view that state intervention in peoples' lives is likely to result in the tyranny of a communist or fascist dictatorship and, therefore, that people should be free to control their own lives; effectively state control and bureaucracy should be replaced by consumer choice. Hayek and others also argued the importance of entrepreneurial alertness contributing to economic growth and their theory of the market. Austrianism, as it is sometimes known, links market function and particularly competition to individual choice; the market frees the consumer and provides incentives for the producer. Hayekian principles can be interpreted, according to Morrison (1994), as competition; consumerism; individualism; choice; diversity; freedom from constraint; privatisation; quality control and information. The second main impetus for the creation of quasi-markets comes from recent developments in business management techniques, which rest on the belief that greater efficiency can be achieved by greater financial delegation and devolving managerial responsibility to the lowest effective level within an organisation. Le Grand and Bartlett (1993) quote Hoggett (1990) who highlights that the organisational changes stemming from the quasi-market are not confined to the public sector. He cites so-called "post-Fordist" changes in private sector organisations with them moving from vertically integrated highly centrist structures to decentralised ones, contracting out their functions to smaller autonomous sub-units in a move away from the single, large scale organisation. The

argument for this new structure, proposed by Bowe, Ball and Gold (1992) and Bash and Coulby (1989), is that those most closely located to the delivery of the service are the ones most able to decide how resources can be used most efficiently and effectively. Another perspective, put forward by Bottery (1996), is that the move towards creating market circumstances has come from two sources; the desire to curb inefficiencies in the public sector and increase effectiveness, and secondly from a desire to reduce the exploitation of services provided by the producers, effectively moving choice to the consumer.

In legislative terms, the creation of a market in education was the result of the *Education Reform Act 1988* (HMSO 1987), targeted particularly on the schools sector, the operation of which rests on five main interrelated factors, according to Bowe, Ball and Gold (1992). The concepts of choice via open enrolment; diversity by extending choice in schools; competition, by schools competing to be "chosen" by parents; per-capita funding, with the funding following the pupil and allowing schools to take a greater responsibility in the management of their own affairs.

Little has been written about the quasi-markets in further education as a result of the ERA, but an interesting basis for comparison is provided by Neave (1990) in his analysis of the development of quasi-markets in higher education. He charts three stages. The first which occurred between 1981 and 1985, which saw the reduction in state spending on higher education and the concept of higher education as part of the welfare state being questioned.

In further education this period saw the emergence of the Manpower Services Commission as a contractor with colleges, and with colleges beginning to generate sources of income from outside their LEA funding. Neave's second phase involved the setting up of new mechanisms of control over output, cost and performance. In further education the *Education Reform Act 1988* (HMSO 1988) and its limited moves towards a market model encouraged colleges to monitor their efficiency and effectiveness more rigorously. Finally Neave's third phase involved the partial withdrawal of the state and its divestiture of certain functions. The incorporation of colleges in 1992 and the significant efficiency gains required by central Government mirrored exactly the trend Neave identified in the higher education sector.

Defining an ideal market in education is difficult but a definition used by Gewirtz (1996), citing the work of Chubb and Moe (1990), when commenting on how closely the English school reforms come to an ideal education market, is that schools would be legally autonomous; free to govern themselves; specify their own goals and methods of operation; design their own organisation structures; select their own student bodies and make their own decisions on personnel related issues. Secondly, that parents and students would be empowered to choose amongst alternative schools, aided by institutions designed to promote active involvement, well informed decisions and fair treatment. Gewirtz (1996) comments that, in four respects English schools do not match Chubb and Moe's model. Firstly, LEAs still have some residual control over Grant Maintained Schools even though their power is much reduced. Secondly, schools have a statutory obligation to teach the

national curriculum; in Hayek's terms a necessary regulatory framework for effective competition to take place (Bash and Coulby (1989). Thirdly, schools are not entirely free to choose their own pupils and must abide by pre-existing admissions criteria, and fourthly no institution exists to promote fair treatment which is easily accessible to parents. If we use Chubb and Moe's definition of an ideal education market we can compare the market in both the pre- and post-16 sectors of education and see how far the further education sector has gone towards becoming an ideal education market.

Chubb and Moe's first group of criteria was that schools would be legally autonomous; able to govern themselves as they want; specify their own goals; design their own organisations; select their own student bodies and make their own personnel decisions. Whilst further education colleges have been, since the 1992 Act, legally autonomous and have been able to specify their own organisational goals, design their own organisation structures and make their own personnel decisions, they have only been able to govern themselves within a detailed framework provided by the FEFC. Whilst the FEFC was, in the period immediately following incorporation, perceived by many commentators as merely a funding body, allocating Government funds to colleges and allowing them to use to the full their new powers of "independence", it has become clear that the FEFC has rapidly taken on a wider role. That role is as the regulator of the further education sector; the FEFC sees its developing role as that of a regulatory body, ensuring good practice and that colleges adhere to its governance, audit and other financial requirements. In all probability, the FEFC plays a far more significant

regulatory role in the governance and management of further education colleges than did the LEA pre-incorporation or does the Funding Agency for Schools (FAS) in relation to the GM schools sector. In terms of selecting their own student body, further education colleges have, since incorporation, been freed from the restrictions on the geographic recruitment of students which applied prior to 1993. Before 1993, post-16 students had to apply to a further education college within their own LEA defined by the student's place of residence. If they were unable to obtain a place in one of their own LEA's colleges they could apply for a place in one of the neighbouring LEA's colleges. If they were offered a place in a neighbouring LEA's college, a recoupement charge had to be paid by their local LEA to the neighbouring LEA to cover their tuition costs. Incorporation has effectively given every potential post-16 student a voucher enabling them to study at the college of their choice, but requiring them to pay whatever tuition fees or other charges that college may levy. Whilst this might imply that potential post-16 students now have unrestricted choice, this would be an unrealistic assumption.

Chubb and Moe's (1990) second group of criteria required of an ideal market in education is that parents and students should be empowered to choose amongst alternative schools, aided by institutions designed to promote active involvement, well informed decisions and fair treatment. The pre-1993 arrangements for the allocation of courses between colleges and LEAs, using the Regional Advisory Councils (RACs), and the geographical location of colleges often being based not on geographic demand for courses but other considerations, sometimes political, means that not all colleges offer the same

choice of courses. Whereas each school has by law to teach the National Curriculum to ensure a uniformity of provision and, in a sense, a base upon which to compare school with school, colleges are able to offer whatever courses they wish, limited only within the college by the availability of teaching resources and staff expertise. The only external funding limitation on the courses offered by a college is that, if a course is to be funded by the FEFC, it must be listed within their schedule of approved qualifications and either be a National Vocational Qualification (NVQ) or be an acceptable equivalent to an NVQ. The course must lead to a qualification as an outcome and not be either a non-assessed or recreational course. This restriction does not apply to courses tailor-made for and funded by an employer. Further, the creation of the FE sector in 1993 brought together former general further education colleges; tertiary colleges, where an LEA may have taken the decision to locate all post-16 provision in one institution; sixth-form colleges, which by their very nature tended to offer a predominantly academic curriculum, and a range of specialist agricultural, art and design and horticultural colleges. Therefore, whilst further education colleges do compete with each other, because of individual institutions' historical development, they are not wholly similar institutions competing with each other. In a re-examination of the market approach in further education by the Association for London Government (ALG 1997), the point is made that a major difficulty facing colleges which are placed in a competitive market is that they are not necessarily competing in the same market hence the ALG is arguing for a fundamental review of the market (quasi-market) arrangements in further education. There is competition between colleges in some of their areas of

activity, but also competition with other post-16 providers; school sixth forms and private training organisations. The funding and regulatory framework of these other organisations is different from that imposed by the FEFC and they may receive more generous funding for similar types of students and may have greater competitive flexibility. The only major area where the further education sector is unable to satisfy Chubb and Moe's criteria is where they suggest a school (college) could select their own student body. The further education college is, in many cases, a second-chance institution allowing those who have been unsuccessful elsewhere to begin again in a further education college. Selection is effectively replaced by structured guidance, allowing anyone to enrol in a further education college, but on the most appropriate course for them on the guidance of college staff.

For students taking a full-time course in a further education college and who would, in all probability, be between the ages of 16 and 19 years, the perceptions of the student and their parents are crucial. However, in further education customers can include a part-time student's present or even possibly future employer; the person in a business organisation responsible for purchasing education or training, particularly if a group of employees are being sent on a tailor-made college course; institutions of higher education who may accept FE students on higher level courses, and future employers who recruit FE students. All are eventual customers of a college's courses and, specifically in relation to this study, overseas governments and overseas students and their parents could well be a college's customers. The examination of the market approach in further education by the Association

for London Government (ALG 1997) is very clear that it is exceptionally difficult to say who the customer of further education is; it is far more complex than merely being that of parent or student. Choice between colleges has been referred to earlier, but one area where colleges have, since the creation of the FEFC in 1992, been more effective has been in the provision of information on which potential customers can base their choices. Colleges have invested heavily in the marketing of their courses and services. The FEFC have not only engaged in a process of publishing a wide range of data, enabling customers who wish to be informed to make comparisons between colleges, but they have also instituted a four-yearly inspection cycle with college inspection reports published and widely disseminated. Prior to incorporation, inspection reports were seldom made available to the potential customers of colleges, but since incorporation they have enabled potential customers of colleges to compare different institutions using like comparators. The issue of fair treatment is covered within each college's complaints procedure and student charter, overlaid with the DfEE's Charter for Further Education. Colleges' performance against their charter is monitored by the FEFC with complaints against colleges being investigated and the results published annually. In summary, it would be fair to conclude that the incorporated further education sector has moved in large part towards satisfying Chubb and Moe's (1990) criteria for an ideal education market; possibly as close to an ideal education market as can ever be realistically achieved.

Whilst Chubb and Moe are concerned with the effects of an ideal market on the consumers of education, Bottery (1996) citing Hood (1991) examines the effects of educational markets on those managing, administering and delivering education. Bottery (1991) again citing Hood (1991) suggests that seven distinct elements have been forthcoming; professionalisation of management within the public sector; use of explicit standards of performance; greater emphasis on measures of output; development of smaller manageable units; increased sector competition; a stress on private-sector styles of management, and greater discipline in the use of resources. Whilst these factors have essentially been bi-products of the quasi-market, their origins can be traced back to *Managing Colleges Efficiently* (DES/LAAs 1985), which led to the ERA, incorporation and the increasing accountability of the further education sector through more rigorous inspection and audit.

In their analysis of quasi-markets, Le Grand and Bartlett (1993) cite certain characteristics that need to be met if quasi-markets are to be successful. Firstly, a quasi-market structure requires that there are many purchasers and at least two suppliers. In most cases, customers of further education should have at least two competing colleges from which to choose. Secondly, that information is readily available in the form of promotional literature and inspection reports. Such information is now clearly available to potential customers of the further education sector. Thirdly, that transaction costs, the costs of managing the new market, and uncertainty created by the newness of the market, need to be kept to a minimum. Unfortunately, the costs of managing an incorporated college are high, with colleges having had to recruit

professional, non-academic staff, in areas such as finance, personnel and premises management. Fourthly, that providers need to be motivated by financial considerations, the possibility of increasing their funding in return for improving their service. During the first three years of the newly incorporated sector, colleges as a whole grew by 25% in direct response to additional funding being provided for an increase in enrolments. Finally, that cream-skimming does not take place, discriminating in favour of those who are least expensive to provide for. Sadly, in further education, there has been a decline in curriculum provision in colleges which is most costly (construction and engineering courses) and an increase in low cost provision (business studies and health and social care courses). This may be purely coincidental and may result from changes in market demand. However, it may be naive to think that, in some cases, colleges have not sought to concentrate on low unit cost courses. Given the above caveats, the further education sector has moved a significant way towards becoming a quasi-market.

2.3 Marketing

The concept of marketing began to gain currency in the further education sector from the mid-1980s onwards. This was due to four major changes which the sector was undergoing and which have been described earlier. These changes can be typified by the decline in demand for traditional day-release type courses; an increase in the need for further education colleges to offer full-time academic courses; the need to respond to the demands of the MSC and the trainees which it was sending to colleges, and the MSC's views about the poor marketing of what was available in the further education sector as a whole. Before going further and considering the marketing of education, a workable definition of marketing is needed based upon the commercial/industrial sector and the marketing of educational courses and services needs to be placed in that context.

Kotler et al (1996:11) state that a market, to which we have referred earlier, is a set of actual and potential buyers of a product, whether in a free or quasi-market, and that marketing means working within markets to bring about exchanges for the purpose of satisfying human needs and wants. Kotler et al see marketing as a process which assists markets to function more effectively and that marketing can only operate where a market situation has been created.

The marketing concept is "a philosophy of service and mutual gain" (Kotler et al 1996:35) and further, what Kotler et al (1996:54) call sense-of-mission

marketing, which is particularly relevant to the educational sector, is one where "The company/organisation should define its mission in broad social terms rather than narrow product terms and that an enlightened company makes marketing decisions by considering consumers wants and long run interests, the company's requirements, and society's long-run interests."

Kotler et al (1996) define the core activities of marketing as including, but not exclusively, product development, research, communication, distribution and pricing. Kotler et al also enhance their definition of marketing to specify that a sub-function, marketing management, is (1996:13) "the analysis, planning, implementation and control of programmes designed to create, build and maintain beneficial exchanges with target buyers for the purpose of achieving organisational objectives".

Brassington and Pettit (1997:5) prefer to rely, for their definition of commercial/industrial marketing on the definition provided by the American Marketing Association, that marketing is "the process of planning and executing the conception, pricing, promotion and distribution of ideas, goods and services to create exchange and satisfy individual and organisational objectives".

Brassington and Pettit (1997:5) also quote the British Chartered Institute of Marketing's definition that "marketing is the management process which identifies, anticipates and supplies customer requirements efficiently and profitably".

Brassington and Pettit (1997:11), in looking for an all encompassing definition of marketing cite one offered by Gronroos that "The role of marketing is to establish, maintain and enhance long term customer relationships at a profit, so that the objectives of the parties involved are met. This is done by mutual exchange and fulfilment of processes".

In order to differentiate the marketing concept from the production and selling concepts, Kotler et al (1996:14) define the three concepts as "The production concept holds that consumers will favour products that are available and highly affordable and that management therefore should focus on improving production and distribution efficiency; that the selling concept holds that consumers will not buy enough of the organisation's products unless it undertakes a large-scale selling and promotional effort, and that the marketing concept achieves organisational goals by determining the needs and wants of target markets and delivering the desired satisfactions more effectively and efficiently than competitors do."

As education is often perceived as an intangible service, we also need to consider any appropriate definitions of the marketing of services rather than concentrating purely on the marketing of tangible goods. James and Phillips (1995:75) cite James (1993), Lovelock (1988) and Cowell (1984) who all perceive education to be a service. Cowell (1984) and Lovelock (1988) define a service organisation as one in which "the activity or benefit the organisation offers is essentially intangible" and where the organisation may not have

traditionally taken a strong marketing perspective. Cowell (1984) goes on to explain this lack of marketing perspective as resulting from "the product's intangible nature; the sector regarding marketing as unethical; the sector experiencing a level of demand in excess of supply; the monopoly nature of the organisation with limited need to market, and little professional guidance and training being available to those within the organisation wishing to adopt a marketing perspective."

Eiglier and Langeard (1977) cited by Cowell (1984) suggest that there are three fundamental characteristics of services; their intangibility, that there are direct organisation/client relationships, and that there is consumer participation in the production process. Gronroos (1978) cited by Cowell (1984) suggests three key characteristics of services; their intangibility; that a service is an activity rather than a thing, and that production and consumption are to some extent simultaneous activities.

Cowell (1984) paraphrased by Foskett (1998) goes further to provide a simple list of the characteristics of market focused organisations in the service and/or public sectors. These organisations have "an attitude of mind focussed towards the customer; an internal organisation system, which is responsive to customers' needs; the integration of a range of activities contributing to the marketing process, and the use of an array of techniques to support these processes."

Kotler (1986) describes a range of activities that fall within the marketing of services. These are summarised by Gray (1991) as "marketing needs/problems; marketing research/audit; marketing planning; the marketing mix (product, price, promotion and place) and marketing strategies and tactics."

Brassington and Pettit (1997:10) also cite another concept, that of societal marketing. They define societal marketing as being "concerned with ensuring that organisations handle marketing responsibly, and in a way that contributes to the well being of society".

It has only been the changes in the mechanisms for the delivery of public services and the increasing pressures of the quasi-market on public sector service delivery, which have resulted in the concept of marketing being fully embraced in the public sector. This service and public sector aspect of marketing falls clearly into what Kotler et al (1996:18) also call societal marketing, and they define it as follows "That the organisation should determine the needs, wants and interests of target markets and then deliver the desired satisfactions more effectively and more efficiently than competitors in a way that maintains or improves the consumer's and society's well being".

Societal marketing is not a process driven by profit but a process driven by a public service ethos and the need for greater effectiveness and/or efficiency in

the service, resulting from reforms to the way the service is managed and delivered.

The translation of the concept of marketing from the industrial and commercial sectors through the marketing of services and societal marketing to educational settings has been slow. Initially, marketing was perceived by staff in educational institutions and other education professionals steeped in education's traditions, as being about maximising a business organisation's profits and not about improving a potential client's awareness of a particular public service. To quote Kotler et al (1996:4) who comment on the concept of marketing becoming a vital component in the strategies of non-profit organisations "Many universities, facing declining enrolments and rising competition and costs, are using marketing to compete for students and funds. They are defining target markets, improving their communication and promotion, and responding better to student needs and wants".

Conway, MacKay and Yorke (1994) cite Smith and Cavusgil who note that college education is a service because it calls for an extreme level of involvement from the consumer, purchase is usually once in a lifetime, the product is intangible, with many costs other than money; time, loss of potential income and psychic costs.

Foskett (1998), when examining the emergence of the quasi-market in relation to schools comments that, as a field, research into educational markets and marketing is relatively underdeveloped. He sees the work of

Kotler and Fox (1988), Gray (1991) and Cowell (1984) as being the dominating texts in educational marketing.

According to James and Phillips (1995) much of the literature on education marketing is characterised by "ideas, suggestions, guidance and strategies which are founded on marketing models taken from non-educational settings." In addition, in their survey of staff working in schools, James and Phillips (1995:77) found amongst those staff a recognition of the importance of marketing, but a limited understanding of its theory and practice.

Interestingly, Robinson and Long (1988) also advocate that the marketing of services in general and of education in particular need to take account of the internal as well as the external market. This internal marketing requires that the employees of an organisation are convinced of the benefits of a product or service, before they can effectively promote it to the eventual end users.

The further education sector could, during the period since 1944, have been perceived as having adopted all three of the concepts cited by Kotler viz; the production concept, the selling concept and, finally, the marketing concept. These three concepts can be traced to various phases in the development of the further education sector. The production concept predominated prior to the late 1970s, when courses were developed largely by the producers of the service and with little reference to potential students and/or their parents and centralised LEA planning often limited colleges' ability to develop courses to suit the market.

The late 1970s to mid-1980s, when the selling concept predominated and marketing was perceived as the process of *selling an educational institution's* existing range of courses and merely more actively promoting a college's existing course offer and little marketing expertise was possessed by colleges. Finally, the marketing concept, which gained hold from the mid-1980s, onwards, when the needs and wishes of a college's clients became paramount following critical reports about the further education sector's ability to market successfully the range of courses and services it offered.

2.4 Marketing of Education

In an early text on the marketing of further education colleges, Davies and Scribbins (1987) disabuse the readership of the deep-seated notion that marketing is synonymous with advertising and selling. However, this view of marketing is easy to understand when our definition is considered alongside the administrative and managerial constraints of 1980s further education. Whilst a college prior to the mid 1970s could conceive of new courses, any such courses which were not funded either wholly or in part by an employer required LEA financial support which, in many cases, would not have been forthcoming. Either no additional funding would have been provided or resources would have had to be reallocated from another course area. In addition, a significant number of higher level courses required RAC approval before they could be offered, both those funded by the LEA and non-LEA funded courses. Effectively, centralised planning determined what courses and services a college could offer. The pricing of courses was also a hurdle to overcome. LEAs set prices for courses they funded, usually adhering to the Council of Local Education Authorities (CLEA) national guidelines on pricing. Courses directly for employers had more price flexibility, but many LEAs also had a costing and pricing structure for these courses to which their maintained colleges had to adhere. Therefore, there was little or no price flexibility available to pre-incorporation colleges. If we assume that the distribution of a course is the place in which it is physically offered, colleges were again limited. Unless the course was offered on an employer's premises, the college would be tied to its using its existing premises or would

have to resort to hiring third-party premises, unlikely if the employer was unwilling to absorb the additional costs. This leaves only the area of promotion within the college's direct control which led to the predominance of the selling concept from the mid 1970s to the mid 1980s. This selling concept was only possible provided that a sufficiently flexible budget existed within the college from which sums of money for promotion could be allocated and the college saw the promotion of its courses as essential.

Many colleges, supported by their LEAs, engaged in the active promotion of their courses including their LEA funded provision, short courses under the banner of PICKUP for local employers and undertook contracted training and the delivery of successful outcomes for their local office of the MSC. A much smaller number of colleges promoted their courses to students from overseas who would pay a full, overseas rate, for their chosen course. It is perhaps worth remembering that the Burnham structure for pay and conditions of Heads of Department and above prior to incorporation rewarded growth in student numbers and activity as did the staffing formula which rewarded growth in student numbers with a greater number of promoted, or more senior posts. However, the pre-incorporation system did not encourage financial surpluses to be generated; effectively colleges were encouraged to use commercial concepts and to generate increased turnover with little attention being paid to the surplus, or profit, generated.

Gray (1991) writing on the marketing of education well after the initial encouragement to colleges to actively market their courses and services,

comments that schools and colleges have always marketed themselves, but it has generally been done patchily, apologetically and instinctively. His views characterise the lack of professionalism in the marketing of further education prior to the mid-1980s. Another telling statement by Gray is that services, such as the education service, are particularly vulnerable when they fail to listen to their customers. Gray saw the increasing emphasis on the marketing of education as linked to the market reforms then being pioneered by Government. He saw the movement of the locus of control from the providers (teachers, their professional associations and the LEAs) to the consumers (parents, employers and communities) as a key influence on the marketing of education coupled with Government policies aimed at obtaining improved value for money from educational providers.

The prompt for many colleges to review their marketing activities and move away from merely promoting their existing portfolio, if they had not been hit by the changes in the market for their courses referred to earlier, was the report *Obtaining Better Value From Further Education* (Audit Commission 1985). The report highlighted the need for colleges to more actively promote their courses to potential students, who would not have seen a further education college as the natural place to study. The report highlighted the need for colleges to collect market information; provide counselling so that students enrolled on the most appropriate course for them and did not withdraw from the course before its completion; seek feedback from students on their course and the service(s) the college offered, and have proper internal college procedures for the setting-up of new courses and the termination of others.

As the bulk of the available literature on educational marketing in the mid-1980s was from the USA, two publications focused the minds of English college managers on marketing. *Marketing FE: A feasibility study* produced by the FEU and HR and H Marketing (1985a) and *Marketing Adult Education* also produced by the FEU and HR and H Marketing (1986). Both provided useful guides to managers on how to begin to review their college's existing promotional activities and develop a marketing function within their colleges. *A Review of Further Education Marketing Provision* again produced by the FEU this time in collaboration with the PACE Group (1985) was focused on the marketing of courses to employers and was more directly related to those colleges who saw this PICKUP type of activity as part of their future development. However, it was the *book Marketing Further and Higher Education* by Davies and Scribbins (1987) and the supporting seminars and courses which effectively made every college management team consider the concept of marketing seriously. Anecdotal evidence suggests that the first marketing professional appointed to an FE college's management team took up post in 1983 and that the first LEA to appoint a marketing professional to each of its colleges (Hertfordshire) did so in 1986. During the following three years a flurry of appointments were made, some successful candidates being marketing lecturers within colleges who wished to put theory into practice, others being marketing professionals from industry and commerce keen to join the new cadre of marketing professionals in further education.

The Further Education Staff College was awarded its largest contract from the MSC in 1986 to produce a set of publications under the banner of the Responsive College Programme, aimed at assisting colleges to more effectively research the market for their courses and to tailor those courses more appropriately to the customers' needs. The culmination of the contract was a pack of information supported by videos, to assist marketing staff in colleges to review their own and their college's activities and to provide in-house development of other teaching- and non-teaching staff in how to market the college. Whilst promotion was still the main focus of the marketing activity in most colleges, market research, curriculum development and an understanding of the wider concept of marketing was beginning to gain ground.

It was the requirement for colleges to produce three-year strategic plans for their non-advanced further education courses (NAFE) for the MSC in 1986 which moved colleges' efforts from merely promoting what the college currently offered towards a strategic analysis of the direction the college ought to be taking, collecting data to support the choice of direction and developing a marketing strategy aimed at achieving strategic objectives. However, in many colleges the range of issues that needed to be addressed: corporate identity; meeting potential clients; promoting the college's success through examination results and inspection reports; public relations to local opinion formers, and seeking the view of clients, were too vast for the resources some colleges were either willing or able to commit to the task. Hence much of the work of a marketing professional in a general FE college for the latter part of

the 1980s was concerned with arranging the publication of the college's prospectus, organising open events, arranging for the college to have an appropriate logo and writing press releases for the local media.

In 1988 and with funding supplied by the DES, the FEDA launched the National Further Education Marketing Unit (NFEMU). From the outset there was a dispute within the sector about the role the unit ought to perform. Anecdotal evidence indicates that many education professionals wanted the unit to be a lobbying organisation; lobbying Government, opinion formers and key industrialists about the merits of further education. In turn, this lobbying may have led to a recognition of the sector's key role in education, training and industrial competitiveness. Another group wanted the unit to act as a central purchasing organisation, negotiating prices for advertising space, printing and other professional services which colleges could buy into. However, its role as finally agreed with the DES was to assist colleges in marketing their own courses more effectively by organising the Marketing Network, a membership organisation for colleges' marketing professionals; organising seminars and conferences, producing publications, and stimulating debate on marketing. The unit ceased operation at incorporation and very limited documentation is available on its activities and successes during its five years' work.

It was only with incorporation, the increased competition between colleges and the funding of growth, that further education as a sector saw the importance of marketing as it being more than merely advertising and

promoting existing courses and services. This realisation, coupled with the demise of the NFEMU, left the further education sector without any organisation marketing the sector as a whole and relied on individual colleges promoting the wider further education service as part of their localised, college-based marketing. Since incorporation, the promotion of the further education sector as a whole has been taken on, in part by the FEFC, who publish inspection reports and other data about the sector and arrange for appropriate media to receive copies, by the Association of Colleges (AoC) the organisation representing colleges at a national level and in employment related issues, and by the Further Education Development Association (FEDA) the successor to the Further Education Staff College (FESC).

Much of the debate since incorporation concerning individual colleges' marketing activities has centred on wasteful competition between colleges, colleges spending increasingly large percentages of their budgets on marketing, and the needless over-promotion of some colleges' activities. In many colleges marketing is still not given the attention it deserves and is still largely concerned with promotion and not with the product, the place in which it is offered or its price. In other colleges the marketing concept has been grasped wholeheartedly and marketing is at the core of the college's strategic planning and development processes.

2.5 Overseas Student Recruitment

The recruitment of students from overseas countries outside the EU has become a significant activity for an increasing number of colleges, accelerating since the ERA and incorporation. When Government insisted that overseas students pay the full cost of their tuition from 1979 onwards, numbers studying on advanced courses of further education declined from 21,313 in 1979 to 13,580 by 1984 and on non-advanced courses of further education from 26,713 in 1979 to 7,612 in 1984 according to the Overseas Students' Trust (1987b). These figures indicate that, for a number of colleges, the recruitment of overseas students had been an on-going activity and part of the college's course portfolio for many years.

The latest data available on the numbers of non-EU students recruited into English colleges of further education has been compiled by The British Council from a variety of sources including the Further Education Funding Council (FEFC). The data refers to the academic year 1996/7 and it is the first time data in this form and level of detail has been made available. However, significant caution should be used when reading the data, as the method of data collection and its subsequent analysis leads to it being of limited value. The view of The British Council on this data is that it should be used for broad analysis only; that no detailed historical data is available for the further education sector, allowing year-on-year comparisons to be made, and that a number of overseas students studying in England may have been

missed from the count. Subsequent investigation reveals a range of reasons why the data is not comprehensive.

The data for all enrolments in English colleges of further education, the group of colleges with which this study is concerned, is submitted to the FEFC using the Individualised Student Record (ISR). The FEFC only invites colleges to submit data on international students but, as it does not fund any part of their study unless they are recruited from an EU country, it does not make it mandatory for colleges to submit data on their international students. Furthermore, the pressure on colleges to attract as much FEFC funding as they can encourages them to concentrate on the validity of their ISR entries for home and EU students and not to see the submission of data on international students as a priority. An informal investigation amongst colleges has revealed that a significant number do not submit ISR data on their international students due to pressures of time. The result of this is that The British Council's figures, derived from FEFC statistics, will significantly under-estimate the numbers of international students enrolled in English colleges of further education. A further complication with the data provided by The British Council is the level of detail in which it is presented. Whilst enrolments are recorded by the student's country of domicile, the type of course they are studying is shown only in terms of its Level (for example 1, 2, 3 and 4 & above), and not the curriculum area being studied or the terminal examination(s) to which the student is aiming. Where The British Council data does attempt to analyse the curriculum area being studied, it does so in terms of the FEFC's Programme Areas, which in many cases are so broad as

to make meaningful analysis impossible. Further, The British Council have included data from so called External Institutions, colleges who receive FEFC funding but are not incorporated colleges. Therefore the data on programme areas contains enrolments from colleges not featuring as part of this study.

However, for the purpose of this study the following information provides a useful audit, in general terms only, of the number, levels, curriculum areas and countries of origin of international students. The accuracy and reliability of the data should be treated with extreme caution, as has been stated earlier.

In 1996/7, according to The British Council, there were 271 000 international students in British education (England, Scotland, Northern Ireland and Wales), 198 000 (73%) in higher education; 57 000 (21%) in further education and 16 000 (6%) in independent schools.

Of the 271 000 students, 45% came from EU countries; 24% came from 14 priority markets specifically targeted for recruitment by The British Council, namely Brazil, Brunei, China, Cyprus, Hong Kong, India, Indonesia, Japan, Malaysia, Pakistan, Singapore, South Korea, Thailand and Turkey.

In the last three to four years for which data is available from the Home Office, the numbers of student visas issued for studying in further education has risen by 30% and is included in The British Council's survey. This is a general indication that the numbers of overseas students studying in the UK is rising.

According to The British Council, Britain had a 17% share of the international student market compared to the USA (68%), Australia (10%) and Canada (5%). However these figures may, according to The British Council, significantly under-estimate the numbers of further education students recruited by Australian colleges.

CHART 2.1: OVERSEAS STUDENT NUMBERS BY LEVEL OF QUALIFICATION IN FURTHER EDUCATION SECTOR COLLEGES IN ENGLAND 1996/7 (INCLUDES ALL EU, EUROPEAN AND NON-EU)							
Year	**Level 1**	**Level 2**	**Level 3**	**Levels 4, 5 and higher**	**Other**	**Total at FE level**	**Total at all levels**
1994/5	8 330	3 240	5 900	1 421	17 314	34 784	36 205
1995/6	9 888	4 054	6 277	1 579	18 783	39 002	40 581
1996/7	14 680	5 865	6 601	1 414	19 976	47 122	48 536
Source; The British Council (1998)							

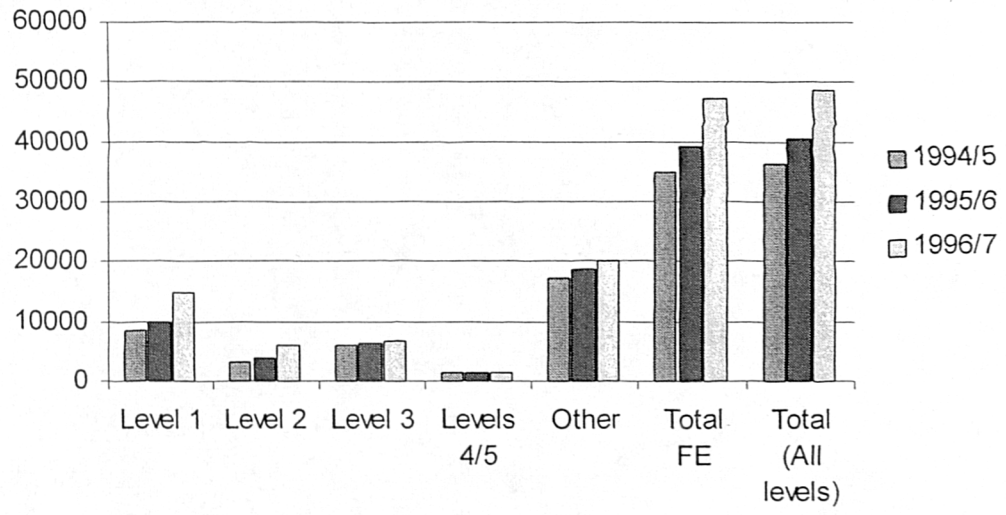


CHART 2.1:
OVERSEAS STUDENT NUMBERS BY LEVEL OF QUALIFICATION
IN FURTHER EDUCATION SECTOR COLLEGES IN ENGLAND 1996/7
(INCLUDES ALL EU, EUROPEAN AND NON-EU)

CHART 2.2: TOP SOURCE COUNTRIES FOR FURTHER EDUCATION STUDENTS IN THE UK 1996/7 (EXCLUDES EU AND EUROPE BUT INCLUDES NORTHERN IRELAND, SCOTLAND AND WALES, SPECIALIST AND DESIGNATED COLLEGES)					
Japan	2 409	Turkey	1 081	Stateless	724
India	1 206	Hong Kong	1 010	Malaysia	556
South Korea	1 184	Pakistan	752	Taiwan	550
				China	544
Source: The British Council (1998)					

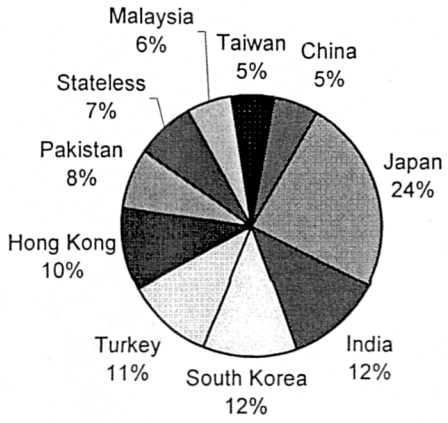


CHART 2.2: TOP SOURCE COUNTRIES FOR FURTHER EDUCATION STUDENTS IN THE UK 1996/7

(EXCLUDES EU AND EUROPE BUT INCLUDES NORTHERN IRELAND, SCOTLAND AND WALES, SPECIALIST AND DESIGNATED COLLEGES)

CHART 2.3:

SUMMARY OF OVERSEAS STUDENT ENROLMENTS BY PROGRAMME AREA AND BY LEVEL OF QUALIFICATION IN FURTHER EDUCATION SECTOR COLLEGES AND EXTERNAL INSTITUTIONS 1996/7 (INCLUDES EU, EUROPE AND NON-EU, AND INCLUDES COLLEGES IN NORTHERN IRELAND, SCOTLAND AND WALES AND SPECIALIST AND DESIGNATED COLLEGES)

Programme Area	Level 1	Level 2	Level 3	Levels 4, 5 and higher	Other	TOTAL
Agriculture	31	113	83	29	58	314
Art and Design	190	545	97	190	423	1 445
Basic Education	1	178	1 052	1 548	4 355	7 134
Business	396	552	353	222	1 417	2 940
Construction	58	39	65	8	183	353
Engineering	136	497	404	116	1 153	2 306
Health and Community Care	47	188	151	225	329	940
Hotel and Catering	273	199	164	36	318	990
Humanities	214	3 344	2 988	10 646	10 046	27 238
Mixed	12	443	267	823	1 182	2 727
Sciences	56	503	241	837	512	2 149
TOTAL	1 414	6 601	5 865	14 680	19 976	48 536

Source: The British Council (1998)

For the purposes of this study, the most pertinent information is that, according to The British Council, in 1996/7, the most recent year for which dis-aggregated data is available, there were 15 560 students from non-EU countries enrolled on non-advanced courses of further education and 1 108 students enrolled on advanced courses in English colleges of further education. This data should be treated with caution as they probably under-estimate the numbers of students enrolled for the reasons described earlier. Those overseas students came from 165 different countries in addition to those who were technically stateless. The top source countries for non-EU students studying in English colleges of further education were Japan, South Korea, Hong Kong, India, Pakistan, Taiwan and China.

The lure of recruiting such overseas students is the fact that, since 1979, they have had to pay fees approaching the full economic cost of their studies. This has encouraged some colleges to see overseas students' fees as a way of filling the vacuum left by the decline in recruitment to other course areas, as a way of supplementing shortages in LEA and later FEFC funding, and creating an additional income stream for the college. Overseas student recruitment can take the form of individual students enrolling on courses already available for home based students, effectively in-filling onto an existing course, being enrolled on a tailor-made course for overseas students, such as a one year pre-university access course, being sent to study in England by their employer or government who will have contracted with an English college to organise an appropriate course, or attending a short one-, two- or three-term course in

English as a Foreign Language. In addition, a number of English FE colleges are delivering a range of education and training courses overseas using a variety of modes of delivery, but those are not the specific subject of this research.

Sadly no detailed study has yet been conducted within the further education sector to determine colleges' motives in recruiting overseas students. Research in the higher education sector has tended to concentrate on two areas; a wide range of ethical, policy and cultural issues, and the types of recruitment techniques used by the higher education sector. These policy issues have included the level to which UK higher education institutions should be recruiting overseas students; what levels of fees overseas students should be charged (St Catherine's Conference Report 1980); the extent to which the recruitment of overseas students should be seen as a legitimate invisible export and a contributor to the country's balance of payments (Hempel 1983); the extent to which UK institutions of higher education have relied too heavily on recruiting their overseas students from Commonwealth countries and have not effectively widened their recruitment base, and the extent to which UK institutions of higher education have allowed overseas students to return to their country of origin with a negative view of the UK, adversely affecting UK overseas trade (Williams 1987). Other policy issues have included the extent to which higher education institutions are being required to generate an ever-increasing percentage of their income from other, non-Governmental sources (Clarke 1987), and ethical and cultural issues relating to the real benefits for an overseas national of studying in the

UK (Patel 1988). Significant research conducted on overseas student recruitment was undertaken under the auspices of the Overseas Students' Trust between 1978 and 1985. This work was reported by Belcher (1987) and Woodhall (1989) and was confined entirely to institutions of higher education. Belcher and Woodhall reported on the issues to which this research project is directed, but only how they impacted upon institutions of higher education. Belcher examined the changes that higher education institutions had put in place to respond to the increase by Government in non-EU student fees in 1979. He concluded that institutions had put in place eleven broad strategies which fall into three overarching categories; increasing funding to support students' study in the UK; investing in marketing, and ensuring that students are well treated during their period of study in the UK. In a survey of 33 universities and polytechnics, Woodhall detected five broad recruitment strategies employed by the institutions surveyed to recruit non-EU students. These can be categorised within Belcher's three over-arching categories. The eleven categories, cited by Belcher (1987), as the response of institutions of higher education's to the need to increase numbers of international students enrolling in their institutions included earmarking funds for development, promotion and recruitment; formation of committees with responsibility for international education; market research, promotional and recruitment visits abroad; universities joining various commercial organisations; putting pressure on The British Council; advertising widely abroad; developing more sophisticated information and promotional materials; establishing international links; establishing access routes for international students; improving their service to international students; instituting scholarships; undertaking

professional and ethical recruitment, and becoming aware of the need to develop an institutional policy on international student recruitment.

Another significant piece of research was conducted, again under the auspices of the Overseas Students' Trust by Williams, Woodhall and O'Brien (1986) and followed earlier work by Blaug and Woodhall (1980). The aim of both pieces of research was to gain a sufficiently broad picture of students' background and personal characteristics, previous education, reasons for studying in the UK, future career and educational plans, sources of income whilst in the UK and their opinions on the levels of fees in UK institutions of higher education for non-EU students. Of those students surveyed, 90% expressed satisfaction with their course(s) and 30% said they were very satisfied with their course(s). Amongst those who were dissatisfied, poor quality of teaching and supervision were the main complaints cited. The Williams, Woodhall and O'Brien study also commented, in relation to further education, that whilst there was a desire amongst those colleges surveyed to increase their numbers of overseas students, there was little evidence of institution-wide, focussed recruitment activity and no college-wide policy on overseas student recruitment. Woodhall (1989) found more than 50% of the students she surveyed reported "personal recommendation" as their main source of information about study in the UK. She also reported that a number of universities were setting up their own alumni associations as another method of attracting international student enrolments.

Ecclesfield (1985) addresses his concerns towards the perception that overseas students in the UK are exploited, provided with poor quality courses, insufficient personal, cultural and language support and are often required during their stay in the UK to live in either sub-standard board and lodging or in a student hostel, predominantly filled with overseas students. Ecclesfield further proposes six reasons why a college may embark on overseas student recruitment. It may benefit the institution; it may be good for the prospective student; it may be good for home based students; it may be good for staff; it may be good for the local community, and finally it may be good for the country.

A recent report by Greenaway (1995) examines the economic impact of overseas students in institutions of higher education and concludes that overseas students do make a positive impact on the balance sheet of institutions and that the value of international students in 1992/3 was £716 million, in addition to secondary effects such as the goods and services purchased by overseas students whilst in the UK. Greenaway also highlights a range of non-economic benefits to higher education institutions including the benchmarking of standards for quality control, a stimulus to course innovation, cultural and intellectual enrichment and the creation of an environment more conducive to mutual understanding between different ethnic groups. Wider, national non-economic benefits include promotion of the English language, promotion of British culture and the fostering of understanding between races. Further Greenaway reveals that the USA receives some 70% of international students enrolling overseas with the UK recruiting 17% and Australia and

Canada being far smaller players. In terms of an institution's dependency on non-EU student income, this varied from less than 0.1% of recurrent income to 23.9%; the average share of recurrent income from non-EU student enrolment is 5.1% for the "old" universities and 2.2% for the "new" universities. In his conclusions, Greenaway comments on the increasing levels of competition between countries for non-EU students and the need for British institutions of higher education to maintain their reputation for quality and their course innovation and marketing. Research by Conway, MacKay and Yorke (1994) considered the market orientation of the "new" universities and found that they were well prepared for either the overseas or home markets; this research was supported by Long and Tonks (1995).

In reality, the real reason for colleges investing in overseas recruitment is most likely to be that it is good for the institution financially; that the institution feels it can provide an educational experience of good quality for the student and that there may be other, tangential benefits from such recruitment. Most of the literature on overseas student recruitment refers to the higher education sector and is concerned with either Government policy on the benefits of overseas student recruitment or concentrates on the welfare and other cultural aspects of providing for the needs of overseas students. As the further education sector's involvement in overseas activities had, up until incorporation, been a matter for individual LEAs and post-incorporation a matter for individual college governing bodies, a national policy or even a debate about one has been difficult to articulate.

The reasons overseas residents choose to study in England include, according to Ecclesfield (1987), the flexibility offered by the English further education system; the fact that further education colleges are based in local communities which may have permanent residents from the students' home country; that English language training is available; that English colleges have well-developed anti-racist and multi-cultural policies; that courses can often be tailored to an individual's needs; that links exist between English FE colleges and local employers facilitating work experience, and that, in many colleges, teacher training courses are available, a popular choice for some overseas students.

How colleges recruit their overseas students, besides being a subject that many colleges will not wish to discuss for commercial reasons, has also not been the subject of any recent in-depth research. The survey by Woodhall (1989) describing five broad recruitment strategies may now be ripe for review. Woodhall cites word of mouth; advertising and the efforts of the British Council; the development of overseas contacts (possibly the use of locally based overseas agents); direct marketing (possibly advertising in study abroad magazines read by potential overseas students and visiting overseas student recruitment fairs); incremental targeting by focusing on a particular target group, and changing courses to suit market needs. In order for marketing efforts to be successful five factors are seen by Ashworth (1988) as being crucial. Knowing the institution's market and where its strengths are; having an appropriate management structure for overseas students recruitment (overseas office and staff); getting the marketing policy right;

delivering the course outcomes that are promised to either students, employers or governments, and having an appropriate pricing policy. For an institution to increase its overseas student recruitment three factors are crucial, according to Belcher (1989): increasing the funds available to support students' studies (bursaries, scholarships and industrial sponsorship); investing increasing sums in marketing, and ensuring that students are treated well during their stay.

Although referring specifically to higher education an institutional policy for overseas student recruitment, UKCOSA (1987b), has been developed and subscribed to by UKCOSA's members. Issues that it suggests should be addressed include a college developing a formal policy on overseas student recruitment which addresses a range of appropriate ethical issues; planning and co-ordination (how students will be recruited and the numbers the college expects to recruit); the resources to be committed to overseas student affairs; incentives to staff to recruit overseas students; the curriculum offering for overseas student; the range of welfare facilities that the college will make available to overseas students, and the staff development that will be provided for those interfacing with overseas students.

Recent research by the Further Education Development Agency (FEDA) (1999) has begun to concentrate, not so much on the characteristics and recruitment of overseas students, but on the management of their programmes of study once they are enrolled into colleges of further education. The FEDA study concentrates on overseas students taking English as a

Foreign Language (EFL) courses. Interesting conclusions were that, of the 228 (51%) of colleges returning completed questionnaires, 100 colleges offered no EFL courses and of those 128 colleges indicating that they did offer EFL courses, none were sixth-form colleges; the 128 consisted of general further education and tertiary colleges. Twenty-eight percent of the EFL provision in colleges returning questionnaires was for students enrolled on other courses within the college; students were studying other subjects besides a dedicated EFL course. A disturbing conclusion of the FEDA research was that in 11% of colleges, EFL courses were managed by a lecturer or part-time lecturer rather than by a member of the college's middle management team. Also, over half the colleges responding to the survey had no particular development plan for their EFL courses; surprising considering that all areas of a college's work have to be reflected in their development plan to satisfy FEFC requirements. The responses to questions on the marketing of EFL also produced interesting results. Only 12% of respondent colleges had produced a special brochure for their EFL courses and only 23% of respondents had regularly produced course leaflets. Marketing of EFL was an acknowledged weakness in respondent colleges, with poor if non-existent links between the EFL section and the college's International Office, responsible for managing overseas students' programmes of study on main-stream courses. In the majority of colleges no international marketing strategy for EFL had been developed and there appeared to be little strategic planning or investigation of new markets. Finally, there was some evidence in the FEDA study that at the very top of some college hierarchies there was little awareness of the potential for EFL to be part of a high quality package for

international students which would increase recruitment onto main-stream academic and vocational courses.

2.6 Summary

The review of literature on the development of the further education sector since 1944 clearly indicates the very significant changes the sector has experienced during its five broad phases of development. The changes, which in the majority of cases have been driven by successive Governments, can be categorised into a number of groups. There have been changes brought about by the need for further education colleges to target particular groups of students, often those who have been previously excluded from post-compulsory education, and to widen access to learning of which the concept of widening participation is only the latest. Changes have been imposed by Governments in order to make colleges respond more effectively to the perceived gap between the skills possessed by the English workforce, and the skill training being provided by colleges. Successive Governments have sought to strengthen the link between the training needs of industry and commerce and the range of skill training provided by colleges. During the late 1980s and early 1990s many of the changes faced by the sector concerned the organisation and management of colleges. Concerns about perceived inefficiencies in the management of colleges and the need to create a greater degree of entrepreneurialism in colleges was evidenced by the Education Reform Act (1988) and the Further and Higher Education Act (1992). These latter changes not only formally introduced the quasi-market into further education but created a national further education sector with reduced levels of local political control. The full impact of the latest Government initiative to impact on the further education sector, Learning to Succeed (DfEE 1999) has

yet to be assessed, but early indications are that, whilst emphasising the advantages of partnership and collaboration between education and training providers, the effect will be to increase competition between colleges and create even greater pressures on them to become more efficient and effective.

Much of the research reported in the section on the marketing of education pre-dated the formal introduction of the quasi-market in further education. Efforts made by Government and colleges in the 1980s to more effectively market their courses and services to all types of client groups were evidence of another effort to increase the numbers of the population who were actively participating in further education. However, this section of the literature review highlights the need, not only for the further education sector to market its courses and services to its potential clients, but also to market the worth of the sector to politicians and lobby groups. Even with all the Government initiatives, large numbers of the population and significant numbers of opinion formers are unaware of the benefits which the further education sector brings to the British economy.

Wherever colleges have actively marketed their courses and services to potential customers, they have tended to focus their efforts on more effective advertising and promotion and the use of concepts developed in the marketing of services in the commercial sector and see their marketing activities as societal, not blindly adopting the techniques used by industrial and commercial organisations to market goods and services.

The formal introduction of a quasi-market in further education was a later development linked to the incorporation of colleges in 1993. Whilst the impact of the quasi-market has been documented in more detail in relation to compulsory age schooling, the formal introduction of the quasi-market in further education did formalise what was already in place informally. The majority of colleges were well used to competing with other colleges, schools and private providers for their students; the introduction of the quasi-market more formally linked an increase in student enrolments to an increase in funding. The quasi-market introduced the "voucher" system in further education, enabling potential students to make a choice about which institution they would choose to study in. The quasi-market also enabled colleges to become far more self-determining, and devolved the governance and management of colleges, as far as possible, to the institutional level.

Overseas student recruitment is one of a range of income generating activities in which colleges are involved. Colleges have been positively encouraged to increase the amount of their income which they generate from sources other than Government agencies. However, the bulk of the research to date which has been conducted in the area of overseas student recruitment has been concerned primarily with the higher education sector. Whilst significant numbers of overseas students have been enrolling on courses in colleges of further education, the levels of income generated by the institutions and the numbers of overseas students enrolled have been far greater in institutions of higher education. It is only since the Government's announcement of the

planned increase in the numbers of overseas students to be recruited into both higher and further education institutions, that further education colleges in particular have begun to perceive the importance of developing good practice in overseas student recruitment which is informed by detailed research.

3 METHODOLOGY

3.1 Existing research

The further education sector was, until incorporation in 1993, largely devoid of discussions about policy issues in general and international activities in particular, possibly resulting from it being a locally delivered and managed service with significant variations in policy and practice between different Local Education Authorities (LEAs). Hughes, Taylor and Tight (1996:7) comment that further education remains grossly under-researched and is, hence, little understood by outsiders. They also comment that the bulk of research on further education remains descriptive, policy-oriented and focussed on single institutions. Hughes, Taylor and Tight also suggest six areas for further research on further education of which a key one is related to strategies for developing new markets. Very little research has been undertaken in the area of international activities and non-EU student recruitment, even when a significant and increasing amount of the non-Governmental income generated by further education colleges comes from overseas student recruitment and effectively supports the further education sector for home-based students. This dissertation could have focused on those many and varied sources of income which English colleges of further education are developing to support the state funding of their core educational programmes. The period since the mid-1970s has seen colleges entering into contracts with a wide variety of employers, Government departments, agencies and other bodies, to sell their courses, services and expertise to the direct financial benefit of the institution.

In the higher education sector institution-wide income generation policies have been refined over a number of years. However, in the further education sector and particularly prior to incorporation, the policy for generating income from non-LEA sources in general, and overseas students in particular, was devised by a college's Local Education Authority (LEA). It was usually a relatively laissez-faire arrangement with issues relating to the total numbers of students to be recruited being left to each individual college, unless its LEA took a more pro-active approach. This was often caused by local political issues such as concerns by a college's local population about the ethics and benefits of recruiting overseas students. Post-incorporation, a significant number of further education colleges have developed strategies to diversify their sources of income which has required them to address non-EU student recruitment. However, researching such a widely spread topic as all types of income generating activities in colleges would have been too complex and too wide in its scope. The recruitment of non-EU students in the further education sector is one where research is long overdue, at both the policy and practice levels. International student recruitment is an area where research will indicate the levels to which the recruitment of non-EU students is not only supporting an ever-declining level of state funding for further education, but also how colleges are competing with other providers of courses for international students, in a near free market. It will also examine those recruitment techniques deployed by colleges that are proving the most effective.

The bulk of the existing research on educational institutions and their international activities, a major part of which is the recruitment of non-EU

students, has concentrated on the higher education sector and has been included in the literature review. Research in the higher education sector has tended to be concentrated in two main areas; a wide range of policy, ethical and cultural issues, which overlay an HE institution's international work, and the characteristics of overseas students studying in the UK and recruitment techniques which the higher education sector has used to develop its overseas student market.

The policy debates in the higher education sector have centred around a number of issues. These are: the level to which UK higher education institutions should be recruiting overseas students; what levels of fees overseas students should be charged, discussed in the St Catherine's Conference Report (1988); the extent to which the recruitment of overseas students should be seen as a legitimate invisible export and a contributor to the country's balance of payments, as reported by Hempel (1983); the extent to which UK higher education institutions have relied too heavily on recruiting their overseas students from Commonwealth countries and have effectively not diversified their recruitment base, and the extent to which UK institutions of higher education have allowed overseas students to return to their home country with a negative view of the UK which has adversely affected UK overseas trade, an issue discussed by Williams (1987). Other policy issues have included the extent to which higher education institutions are being required to generate an ever-increasing percentage of their income from other sources, effectively reducing their reliance on central Government funding, and how educational institutions develop their own overseas student

recruitment policies, discussed in detail by Clarke (1987). Patel (1988) raises the question of ethical and cultural issues, and includes consideration of the real benefits to an overseas national of studying in the UK and the benefits which the individual will take back to her/his home country, once s/he has completed the course. Should UK educational institutions be concentrating on capacity building in overseas countries, supporting the foundation of educational institutions in overseas countries with academic guidance from the UK, rather than merely taking students out of their own culture for what is perceived as the short-term financial gain of the UK institution? Ecclesfield (1985) addresses his concerns towards the perception that overseas students in the UK are exploited, provided with poor quality courses, insufficient personal, cultural and language support and are often required to live during their stay in the UK in either sub-standard board and lodging accommodation or in a student hostel, predominantly filled with overseas students, reducing the real benefits of studying in the UK.

The most significant study of overseas students in their place of study, funded by the Overseas Students' Trust was conducted by Williams, Woodhall and O'Brien (1986) and followed an earlier study by Blaug and Woodhall (1980). However, the budget and timescale of this research precludes such an extensive and lengthy survey. The studies referred to used a range of research instruments. In the 1986 study, interviews were conducted with 1760 students in 14 higher education institutions and with 187 academic and administrative staff supported by a postal questionnaire to all English universities, polytechnics and colleges of higher education. In addition, 12

interviews were conducted with private institutions of further and higher education and a questionnaire survey was sent to a further 170 private institutions. The 1980 survey interviewed 1 484 students out of an *initial* sample of 2 735 who were approached to participate in the research. The aims of both pieces of research was to gain a sufficiently broad picture of students' background and personal characteristics, previous education, reasons for studying in the UK, future career and educational plans, sources of income whilst in the UK and their opinions on the levels of fees in UK institutions of higher education for non-EU students. Sadly the studies cited did not seek information on recruitment techniques or on the students' satisfaction with their courses of study in the UK. This study was not be able to engage with such significant numbers of overseas students or survey them in such depth owing to constraints of funding and time.

The most significant piece of research conducted on overseas student recruitment was undertaken between 1978 and 1985 and was reported by various authors writing under the auspices of the Overseas Students' Trust. It indicates that, certainly in the views of Belcher (1987) and Woodhall (1989), the recruitment of non-EU students specifically into higher education is very much an activity which takes place in a virtual free market and certainly not a quasi-market. The relationship which they describe is very much one between the institution and the student, with governmental intervention playing a much less significant role than was the case for home-based students. The only note of caution is that the full impact of the quasi-market had yet to take effect in education when Belcher and Woodhall were writing, and that the writers

were responding to a change in Government policy which had and was continuing to have a severe impact on the recruitment of non-EU students into institutions of higher education.

Belcher and Woodhall specifically addressed, albeit in the higher education sector, the issues towards which this piece of research is directed; the reasons for non-EU student recruitment into English educational institutions and the most effective recruitment techniques which were used. Belcher (1987) examined the changes that higher education institutions had put in place to respond to the increase by Government in non-EU student fees in 1979. He concluded that institutions had put in place eleven broad strategies which fall into three over-arching categories; increasing funding to support students' study in the UK; investing in marketing, and ensuring that students are well treated during their period of study in the UK. In a survey of 33 universities and polytechnics Woodhall (1989) detected five broad recruitment strategies employed by the institutions surveyed to recruit non-EU students; use of word of mouth to promote an institution; advertising; development of contacts overseas; direct marketing; incremental targeting, and changing courses to suit market needs. These can be categorised within Belcher's three over-arching categories. Therefore, this research begins with a theoretical framework drawn from the higher education sector, but which can be tested within the current further education sector.

3.2 Scope of the study

The scope of this dissertation is confined to English colleges of further education incorporated in 1993 and funded from central Government by the Further Education Funding Council (FEFC). It excludes those institutions designated by the FEFC as being eligible to receive an element of recurrent funding from them, but which were not incorporated in 1993. It also excludes the specialist designated institutions, often residential colleges, which respond to the needs of students with learning difficulties and disabilities and other groups with special education needs, in their broadest sense. This dissertation does not concern itself with Scottish colleges, Welsh colleges or colleges of further education in Northern Ireland. The relatively small number of Scottish colleges have, as part of their course portfolio, a much larger concentration of Advanced Further Education (AFE) than do English colleges, which changes the character of the institution and makes the desegregation of the further education element of their work more difficult. Both the Scottish and Welsh colleges are funded using a methodology significantly different from the English system, which exerts different financial and organisational pressures on them. In addition, the Welsh colleges' funding council takes a far more active role in the management and development of their colleges, acting in similar ways to a large Local Education Authority (LEA). The colleges of further education in Northern Ireland are currently being incorporated and undergoing major changes in their structure and management resulting in them, in all probability, being unwilling to participate in this study. In addition, the adverse publicity that Northern Ireland has received overseas makes

colleges there unable to compete in the marketplace with English colleges on an equal footing. This study also excludes privately owned colleges of further education, represented nationally and internationally by the Confederation of Independent Further Education (CIFE), the independent tutorial colleges and the private language colleges which concentrate solely on providing one-, two- and three-term courses in English as a Foreign Language (EFL).

This dissertation only concerns itself with the recruitment of students from non-EU countries onto courses of study offered in England. As the literature review has indicated, colleges of further education are now engaged in a wide diversity of international activities, a list of which can include, amongst others, providing both short and longer courses overseas, either in partnership with another educational institution, a locally based employer or in premises they have purchased or leased overseas; distance learning courses using written materials, video cassettes, CD ROMs and other technologically based teaching materials, supported by lectures provided either by locally based staff or by staff from the English college; training courses in the workplace where a contract has been entered into between the English college and a locally based employer, and contracted training work funded by one of the British aid agencies operating overseas. The advantage of confining this dissertation to the study of courses provided in England is that the subject matter is relatively easily researchable; other types of international activity would require visits overseas and access to information that both colleges and overseas based partners may be unwilling to release. Secondly, confining this study to only students recruited from non-EU countries, excludes the study of any EU-

funded programmes of training provided in England in partnership with other EU member states and excludes funding by the EU of student cultural and experiential exchanges. All EU related activities with which colleges of further education become involved have a level of bureaucratic and administrative complexity which make any meaningful study difficult, without the research becoming enmeshed in the intricacies of EU funding policies and administrative practices.

The recruitment of international students to courses delivered in England usually results from a direct contractual relationship between the college and the student; no contractual intermediaries are involved, except where an overseas government or employer is paying for the student's study, in which case the contract is between the college and the government/employer. Even in the cases where a college uses an educational agent as an intermediary overseas, the contractual relationship is invariably between the college and the student.

3.3 Focus of the study

It was therefore decided that the focus of this dissertation would be the recruitment by English colleges of further education of students from non-EU countries. The dissertation is therefore centred around three inter-related research questions.

1 *How many non-EU students are studying in English colleges of further education and what are the characteristics of those students, in terms of their course of study and country of origin?*

This question required the collection of purely factual data and has, in large part, already been reported in the section of the literature review relating to overseas student recruitment. However, it is important to note that, at the time this research was commenced, the only data published officially on overseas student recruitment was very broad, aggregate data, produced by the Department for Education (DfEE). Further, whilst the Further Education Funding Council (FEFC) does now collect and publish data on students enrolled in English further education colleges and who are not directly funded by the FEFC, their data was, and still is, collected in a largely aggregated form. The FEFC's data consists of aggregate figures of total student numbers and does not indicate either the type of institution in which students are studying or the type of course on which they are enrolled. Further, there is no statutory requirement for colleges to submit data on overseas student enrolments to the FEFC which results in their data being at best partial. In addition, the time delay between the FEFC collecting data and them making it available for publication, often three years, means that their data has limited value.

2 *What is the motivation of English colleges of further education for recruiting non-EU students?*

Question Two required responses from colleges indicating their reasons for recruiting non-EU students. This was clearly going to prove to be a more difficult question for which to elicit an accurate response. It not only required the respondent to be familiar with the historical development of a college's student recruitment activities but also sought to collect opinions and non-factual data. To respond successfully would require an intimate knowledge of the College's development and decision making processes over a number of years. A college's decision to recruit non-EU students may have been taken many years prior to the incorporation of colleges in 1993, a period when the recording of policy decisions by the college's governing body or local education authority (LEA) may not have been as rigorous as is now required of the incorporated college. Also worthy of comment is the significant turnover of both governors and managers in colleges since incorporation. There may be, in some colleges, little continuity in either the governance or management of the college with the real reasons for overseas student recruitment being lost in the college's past. It was crucial that the research instrument used was targeted at an employee of each college who was of sufficient seniority to have both the understanding how policy decisions were and are made, and access to appropriate documentation to be able to provide an accurate response. If they were unable to trace the decision making process, then they needed to be sufficiently senior to be able to comment to the effect that no record of the decision to recruit overseas students was available.

3 *What are the most successful techniques used by English colleges of further education to recruit their non-EU students?*

The third question concerned the most effective techniques used by colleges to recruit non-EU students. This question required the collection of data of opinions and perceptions rather than of factual and numeric data. In addition, a considerable complexity surrounds successful student recruitment and a direct interface between the researcher and the respondent would clearly be needed.

3.4 Methodology

The theoretical field within which this research is located is that of the market and quasi-market. The research draws upon literature related to markets, commercial/industrial marketing, societal marketing and marketing within the further education sector. It also draws upon existing research conducted in the higher education sector related to overseas student recruitment. This study is what Patten (1987:89) would describe as "a study which involves asking open-ended questions of people and observing matters of interest in real-world settings in order to solve problems, improve programmes and develop policies."

In selecting an appropriate methodology for this piece of research, account had to be taken, not only of the types of data to be collected and analysed, but also the projected timescale and budget for the research. In order to collect appropriate data to answer the three inter-related questions around which this research is based, data of a factual nature, historical data and opinion-based

data had to be collected. Whilst this research is predominantly qualitative, there will, by necessity, be reference in some detail to quantitative information. As Crossley and Vulliamy (1984) comment, qualitative researchers do sometimes use data collection techniques that result in quantification and statistical analysis. Bogden and Taylor (1975) contrast qualitative and quantitative methods, seeing quantitative methods as concentrating on single variables and qualitative methods as being descriptive of the whole. This research uses both quantitative and qualitative methods. As Jick (1983) has stated, qualitative and quantitative methods should be seen as complementary and not rivals, whereas Fetterman (1988:12) advises against an undisciplined approach to the combination of methods which can lead to the undermining of the most interesting of studies.

In order to provide the data which will answer the three research questions and test the propositions of Belcher and Woodward, two main research instruments will be used. A questionnaire survey will be sent to all English general, tertiary and sixth-form colleges. This will be followed by three/four visits to colleges to compile institutional biographies or case studies. During each of the visits, in addition to conducting a number of semi-structured interviews, a documentary analysis will be undertaken to review both published and internal college documents relevant to overseas student recruitment. Further, where possible a review will be undertaken of institutions' non-EU student satisfaction surveys which should give a clear indication of students' perceptions of their course(s) of study.

Whilst the vehicle for conducting the research will be through the producers of the service (the colleges), the views of the students (the consumers of the service), will not be ignored. Each of the three case study colleges should have, in order to satisfy their student charter obligations, to carry out regular student satisfaction surveys, the results of which will have to be presented to the colleges' governing bodies.

3.4.1 Questionnaire Survey

The first stage of this research will be to send a self-completion questionnaire survey to all incorporated English colleges of further education. May (1993) recommends that, in preliminary work prior to embarking on a questionnaire survey, an examination takes place of what work has already been undertaken in the field to be researched. Sadly, with so little existing research, we cannot, to use the terminology of May (1993), use this research to test and/or refute the propositions of earlier research, nor can we use it to re-contextualise other data for application to the further education sector. We are effectively starting afresh.

Bell (1987) describes the questionnaire as a census. The research instrument used had to be designed to collect far more specific data on international recruitment of students into English colleges of further education than was available elsewhere. Bell (1987) comments that the census is one example of a survey in which the same questions can be asked of the selected population.

In order to gain further education sector-wide data on overseas student recruitment, the questionnaire was the only instrument that would provide an opportunity for every institution to respond and for wholly comparable data to be collected. Whilst a visit to each further education college to administer a questionnaire in person would have possibly provided more reliable data, and is how Wilson (1984) would characterise a survey, the cost of such an approach and the time it would have taken were prohibitive. To use the terminology of May (1993:11), a questionnaire survey was necessary to produce data that was "accurate, meticulous, precise and generalisable." However, using a postal questionnaire has its limitations. Oppenheim (1992:102) considers its limitations as being "a generally low response rate; no opportunity to correct misunderstandings or to probe; no opportunity to check on how the questionnaire is completed and the order in which the questions are completed, or the opportunity to collect information by observation."

In view of the number and diverse geographical location of colleges, the self-completion questionnaire appeared to be the only cost-effective research instrument that would collect such a significant amount of data in a reasonably short timescale. Bell et al (1984) comment that the interviewer-administered questionnaire is to be preferred on the grounds of accuracy and the higher rate of questionnaire completion, compared with the self-completion questionnaire which is much cheaper to administer and is used where no clear benefits are gained from using the interviewer-administered questionnaire. Bell et al also comment on the key advantage of the questionnaire survey being the ability to collect a significant amount of information in a relatively

short time. The questionnaire was designed wherever possible following the advice of Sudman and Bradburn (1982) and the pilot testing followed the three stages proposed by de Vaus (1991) of developing the questions to be answered; developing the questionnaire, and then the polishing the questionnaire prior to the main survey.

The questionnaire survey will not only provide the most appropriate collection method for detailed data for analysis, specifically of the curriculum areas in which overseas students are studying, but also for the background information to be used to select colleges to participate in the institutional case studies.

In relation to the second question in this research, which is also a key component of the questionnaire survey, and to secure suitably detailed and accurate information, it was necessary that the questionnaire survey was targeted at the most senior employee of the college, its Principal/Chief Executive. As Bogden and Bicklen (1982) comment the College Principal acts as "gatekeeper", in many cases restricting access to information and also being the repository of much information on a college. Using a research instrument that did not involve the college's Principal would have been extremely difficult and would certainly not have facilitated access to conduct the institutional case studies. In addition, by using a questionnaire survey to answer this second question, it was also possible to combine it with the questionnaire to collect data in relation to Question One. This enabled a validation and amplification of the already published data from the FEFC to be undertaken, relating to the numbers of overseas students which are recruited,

and the courses and curriculum areas in which they are studying. Whilst the possibility existed of using smaller focus groups of college Principals to elicit qualitative answers relating to colleges' motivation for overseas student recruitment, issues of confidentiality and Principals' natural reluctance to share confidential information with their perceived competitors rendered this option unworkable.

The questionnaire was piloted by a sub-sample of three colleges who, along with the Association for Colleges' (AoC's) Director of Research, provided useful feedback on the design and structure of questions used in the survey. The pilot study effectively consisted of three stages. In Stage One, once the questionnaire had been agreed by the project supervisor as being constructed in a form which would provide data appropriate to the questions to be answered, it was pilot tested by the AoC's Director of Research. However, this was not a true pilot of the questionnaire as no "live" data was being used in completing the questionnaire; only the general format and structure was being piloted. The AoC's Director of Research, a retired Principal with a research background, has led, along with other researchers, all of the previous AoC research projects. He has collected a significant amount of informal data on the most appropriate length, structure and design of questionnaires to be sent to Principals of further education colleges and which achieve a response rate of in excess of 50%. By sending the questionnaire to each college's Principal, it could reasonably be assumed that an individual with an understanding of the questions being asked and the ability to think of the whole range of responses, would have been targeted. Either the Principal

would complete the questionnaire him/herself from data provided, or s/he would ask another more appropriate member of staff to complete the questionnaire. The length of time taken to complete the questionnaire and the order of the questions being asked follows the format adopted in previous AoC questionnaires. After a set of classification questions, the questionnaire moves through broad areas towards a final question asking if a respondent college wishes to participate in further research. The questionnaire has a target completion time of 20/30 minutes.

In Stage Two a member of staff in one of the colleges to be surveyed was asked to complete the questionnaire, using the sources of data for completion envisaged by the researcher. This stage of the pilot was conducted in the researcher's own college, the questionnaire being completed by the member of the college's management team responsible for international students. The advantage for the individual completing this stage of the pilot was, that if any difficulties arose, he would have been easily able to contact the researcher. This stage of the pilot revealed that the questionnaire could be completed within the target completion time of 20/30 minutes; that the data each college would need to extract from its Individual Student Record (ISR) database was easily accessible in the form required, and that no re-wording of any of the questions was required; all of them were easily understandable.

Stage Three was the most critical phase of the pilot as three colleges, all of whom had no vested interest in the success of the questionnaire, were asked to complete it. It was decided to select three large colleges, all of which

recruited a large and diverse number of international students, to participate in this stage of the pilot. If each of these colleges was able to successfully complete the questionnaire without undue problems, it could reasonably be assumed that all colleges to be surveyed would find the questionnaire similarly straightforward to complete. The researcher wrote to the Principal at each of the three colleges during the first week of the Summer vacation. He explained the background to the questionnaire, enclosed a copy of the draft letter which would eventually be sent to all colleges, and enclosed a copy of the questionnaire. Each of the three colleges was asked to return their completed questionnaire within three working weeks. This was the only stage of the pilot where the questionnaire was completed by someone who had no direct access to the researcher if any problems had arisen in completing the questionnaire. However, respondents were invited to write to the researcher with any comments on the structure, layout and information requested in the questionnaire on their completed questionnaire. No specific problems were encountered by the three colleges and the questionnaires were returned within two working weeks of being sent out.

The questionnaire aimed to gain responses to each of the three questions at the heart of this research, but was the sole research instrument used to answer the first question. For such a questionnaire survey to have credibility amongst college Principals, who initiated the completion of the questionnaire in each college, it needed to have the support of the AoC, which represents at a national level all incorporated colleges. The AoC has a regular programme of seeking data on the further education sector by the use of questionnaire

surveys and agreed to support this survey. The advantage of this support was that, as Youngman in Bell et al (1984) comments, the appearance of the questionnaire (in a house style) will encourage respondents to complete it. As with all previous AoC surveys the information provided was treated in confidence, will only be published in an aggregated form and the results of the analysis will be sent to each college which returned a completed questionnaire. The experience of the AoC is that, of 420 (approx) colleges who are sent questionnaires, an average return rate of 50% can be expected. Not only is this a higher return rate than for many questionnaire surveys but it also indicates the level of commitment which the further education sector gives to AoC supported research. Without the AoC's support such a high return rate could not be expected. Even with such a significant return rate, some of the factual data relating to the numbers of non-EU students studying in the UK will still be incomplete. There is also the possibility, although only a slight one, that some colleges, through intent or lack of accurate data, may submit inaccurate information in response to the factual parts of the questionnaire. Had the FEFC been able to provide enrolment data on non-EU students at the time this research was commenced, their data could have been relied upon as accurate, although it will not provide data in as much detail as will be possible with the questionnaire survey.

After a set of classification questions relating to a respondent college's name, type, budget size, FEFC region, Government Office region and name of respondent, questions fall into four broad categories; factual questions [1, 2(a), 3(a)(b), 4(a)(b), 6 and 7]; questions requesting an opinion [2(b) and 9]; both

factual information and an opinion using an attitude scale [5] and finally an agreement or otherwise for the college to participate in follow-up research [8(a)(b)].

The factual questions requiring statistical data were all designed to enable the data to be easily extracted from each college's management information system. Question 4 required information to be extracted from a college's financial accounting system and a simple calculation made. The opinion-based questions were the ones which required the respondent to have either been a participant in discussions about a college's non-EU student recruitment policy or have access to or a familiarity with policy decisions and documentation within the college. The same proviso applied to the question requiring both factual data and opinion. The questions relating to a college's participation in further research also required the respondent to either be a policy maker or have access to policy makers within the college, and be able to make a commitment to participate in further research.

The questionnaire survey responses are analysed using the Pinpoint computer programme, a powerful tool for both designing questionnaires and analysing the responses to them. The Pinpoint programme allows the format for the analysis of each question to be designed simultaneously with the initial questionnaire and allows for the easy coding of the responses each question will generate. The programme also allows responses to each question to be shown in numeric and graphical form and to be compared to responses to other questions.

3.4.2 Institutional Biographies/Case Studies

The aim of the case studies or institutional biographies was to enable the research, when written-up, to contain a greater depth of qualitative data than would be possible purely through a questionnaire survey, and for the results of the analysis of the questionnaire survey to be tested within a sample of colleges. In addition, the more complex question of recruitment techniques could be examined in detail. According to Nisbett and Watt (in Bell et al 1984), the role of the case study is to portray a specific situation in such a way as to illuminate more general principles. Bogden and Bicklen (1985) also comment on the benefits of the case study approach, which allows a concentration on processes rather than outcomes and products. According to Bell et al (1984) in a case study evidence is collected through a variety of techniques including observation, interviews, examining records and documents and meeting with "pupils". Bell sees the advantage of the case study as being its ability to provide a three-dimensional reality and being able to provide suggestions for intelligent interpretation of other similar cases. However, according to Bell et al the case study has a number of weaknesses, predominantly that the results are not easily generalisable except by an intuitive judgement and that, in some cases, the researcher only finds what s/he wants. The link between the survey method and the case study is made by Bell, highlighting that survey research can successfully be followed up by case studies to test out conclusions and test out specific instances of an event.

The questionnaire survey approach did raise questions of access to an institution's key information and the choice of the case study method raised further questions about access to institutions. Measor (1985) highlighted access as being one of the first important issues to be overcome prior to undertaking an institutional study. Johnson (1984) stresses the importance of gaining access to enable research to be conducted and two key questions raised by Bogden and Biklen (1982) namely "what are you going to do with the findings" and "what will we get out of this" were key drivers in the way this phase of the research would be conducted.

Initially the three colleges who participated in the questionnaire's pilot study had agreed to allow access as part of the case study phase of this research. However, in two of the three colleges, business pressures intervening between them completing the questionnaire and being asked to participate in the case study phase of the research, led to them reluctantly refusing access. However, two other colleges, of similar size and with a similar experience of international student recruitment, supplemented by a third college, all agreed to participate, resulting in a sample of four colleges. In view of the very small number of sixth form colleges actively engaged in international student recruitment, it was decided only to visit medium to large sized general colleges of further education, who would be able to provide the most detailed information on the topic.

It was planned to visit each college for two days using a series of semi-structured interviews. The researcher would use what Patten (1987) terms a general interview guide and would, to use the advice of May (1993), see the interview as the starting point to seek both clarification and elaboration on an institution's responses to the questionnaire survey. This was followed by seeking the institution's views on the general applicability of their views to other colleges within the further education sector. In addition to the respondent to the questionnaire, interviews were planned to be held with a range of college staff including the Principal (if s/he was not the respondent to the questionnaire), the Chair of the Governing Body or another college Governor (if they are willing to participate and the college Principal is willing for them to participate), the Assistant Principal responsible for curriculum issues and/or the Head of Overseas Student Affairs, the college manager responsible for marketing and the member of the college's staff responsible for overseas students' welfare. The advantage of such a wide range of a college's staff would enable, to quote Nisbett and Watt (1985), a process of cross-checking to take place. By interviewing as wide a range of staff as possible in each of the institutions it was planned that individual respondent's opinions could be triangulated and tested. The interview form contained twelve main questions to be asked of each individual who agreed to be interviewed, plus a range of supplementary questions. This interview structure would avoid what Burgess (1985) calls "rambling" to take place with only a small number of the questions planned by the interviewer actually being asked and responded to.

The results of the interviews will be recorded on pre-printed interview record sheets and the responses will be analysed question by question. It is not envisaged that any computer programme will be used to analyse the responses to the interviews, but any numerical data obtained in either this phase or the documentary analysis phase of the research will be analysed and compared with any comparative data obtained from other interviews.

At each of the three colleges to be visited access was sought to a range of documentary evidence to add further depth to the responses to the questionnaire survey and the semi-structured interviews. Documentary evidence to be requested included a copy of the college's institutional strategic plan, which would hopefully describe where non-EU student recruitment is placed within the wider development strategy for the institution; any marketing plan for the recruitment of non-EU students; minutes of any Governing Body meetings which have discussed non-EU student recruitment and the evaluation of the college's investment in non-EU student recruitment. These primary documents would, in all probability, have been produced by one of the participants in the interview phase of the research and would be capable of being challenged if there appeared to be inconsistencies and ambiguities. Whilst some of these documents may have been considered confidential, what Scott (1990) terms "closed and restricted", it was hoped that colleges would release them to the researcher within the protections and safeguards outlined earlier in the methodology. However, to quote Foster (1994), these documents should be used with caution. There was always the possibility that they may contain particular emphases as they will have been written for

particular audiences within the college and may have been written to achieve specific outcomes, and so may not represent a true account of events. It was hoped that these documents would not only provide further depth to the other research methods but would also indicate key issues that concerned governors and managers in the recruitment of non-EU students. Copies would also be requested of all promotional material used by the college in its overseas recruitment activities. Whilst this would provide useful background data, the objective evaluation by each college of their investment in and techniques used in non-EU student recruitment would provide much more illuminating and meaningful data rather than a superficial review of how appealing or "student-friendly" various written materials appeared to be. The analysis of any documents obtained will be incorporated into the analysis of the interviews alongside the responses of the interviewee who provides a document.

Perhaps the most challenging of the three broad questions to be posed to colleges and the one which would take up the bulk of the interview time concerned those recruitment techniques which colleges viewed as most and as least successful. At a superficial level colleges should have been easily able to provide this information, as those colleges actively recruiting non-EU students would, in all probability, have an international/overseas marketing strategy and plan subject to annual review by their governing body. If the respondent(s) to the research instrument were sufficiently senior, they should have been able to access this report as the basis for providing a sufficiently accurate set of answers to the question.

However, it would be naive to assume that the recruitment techniques solely within a college's control are the only ones which are likely to generate non-EU student enrolments. A range of other factors will impact upon non-EU student enrolment and these could be categorised into four areas.

On a personal level will be a potential student's and his/her parents' preferences; a potential student's access to funding for study overseas, a significant sum if tuition fees and the cost of living overseas are taken into account; parents' and potential student's perceptions about a particular English college, possibly as the result of word of mouth from friends and acquaintances who have already studied there and its geographical location and that area's perceived benefits, and finally the ready availability of further and higher education in the student's country of residence and the perceived quality of that further and higher education.

At a local governmental level will be a potential student's access to higher education. In some countries certain ethnic groups are denied access to state-funded further and higher education and in others the local government may be unwilling for its nationals to study overseas, and thirdly the perceived benefits in the home country of studying overseas.

At a competitive level will be students' decisions about whether to study in England or whether to choose to study in one of the other countries actively recruiting non-EU students, such as Australia, Canada or the USA, and the

relative ease of gaining access to an appropriate course; the cost of that course; the perceived benefit in the student's home country of the course and the country of study; the level of financial support or scholarships available to the overseas student, and the possibility of a period of study in that country counting towards permanent residency, which is considered to be a long-term objective of many students studying overseas.

Finally, at a global level are the perceived benefits of an English qualification, the support that the British Government offers to students studying in the UK, the level of fees the overseas student will have to pay; the current rate of exchange between the UK and the student's home country, and perhaps most crucially, the perception of Britain as a country which is seen to have an Education system of quality and status.

If colleges take into account the above factors and any others which may impact on non-EU student recruitment and allow for these when assessing the effectiveness of their recruitment techniques, they should be able to say, with some level of accuracy, which techniques have firstly generated the greatest number of non-EU student enquiries about courses and secondly the techniques which have resulted in the greatest number of those enquiries turning into firm student enrolments.

The final stage of the case study research will be to examine each of the three college's student satisfaction surveys in relation to their non-EU students. Anecdotal evidence indicates that some further education colleges make

significant claims about the service they offer to their non-EU students, but that the rhetoric and the reality are often significantly divergent. Whilst an examination of questionnaires completed by non-EU students in each of the three colleges would give an indication of the students' level of satisfaction with their course of study and the service the college was providing, a group interview with 6/8 students would provide greater depth of evidence and a clearer picture of the students' experience of studying in the UK. However, this could prove to be the most contentious part of the research and a careful approach would have to be made to each of the college Principals prior to beginning the college visits in order for access and support for this phase of the research to be gained. The significant advantage that would be gained from this phase of the research is the opportunity to triangulate the views given by college representatives, examine whether colleges are acting ethically in their recruitment of non-EU students and whether colleges' rhetoric is matched by reality in terms of what they offer their non-EU students.

The analysis of any student satisfaction surveys obtained will, in all probability, have been undertaken by the college as part of its normal analysis of student satisfaction data. If comparisons are possible between colleges' data, then this will be undertaken. If no comparable data is available to compare the responses from one college's students with another, general impressions will be reported, supported by any limited comparisons that are possible.

4 FINDINGS

4.1 INTRODUCTION

The research methods selected for this study were a questionnaire survey of all English colleges of further education, with a small number of exceptions, and four institutional case studies, used to explore the findings of the questionnaire survey in more depth. The findings from both investigations are presented here in two separate sections, but with connections made between the data collected in each.

4.2 THE QUESTIONNAIRE SURVEY

4.2.1 Background

The questionnaire survey of all English colleges of further education, tertiary colleges and sixth-form colleges was despatched to all AoC member colleges on 6 October 1998. The support of the Association of Colleges (AoC) for this questionnaire research was gained on 23 February 1998; the pilot test of the questionnaire was sent to three sample member colleges on 21 May 1998, and the final version of the questionnaire lodged for despatch by the AoC on 13 July 1998. Due to internal organisational problems at the AoC, the questionnaires were not actually despatched to member colleges until 6 October 1998.

The colleges being surveyed were given until 14 October to return their questionnaire to the AoC's offices in London. A follow-up letter was sent out by the AoC on 30 October asking those colleges who had not yet returned their questionnaire to do so by 13 November 1998 at the latest.

A total of 468 questionnaires were sent out to all paid-up members of the AoC. Whilst not all general further education, tertiary and sixth form colleges are members of the AoC, only a small number, fewer than 12 colleges, are not members of the AoC. The sample was therefore sufficiently wide to be representative of the general further education, tertiary and sixth form colleges sector being surveyed. A total of 185 completed questionnaires were returned to the AoC. However, *the AoC sent questionnaires by mistake to 5* art and design colleges, 28 agricultural colleges, 19 specialist designated colleges, 35 Welsh colleges and the colleges in Guernsey and Jersey. None of these colleges formed part of the sample of the survey and the 2 returned questionnaires from the art and design colleges, the 12 from agricultural colleges, the 7 from specialist designated colleges and the 6 from Welsh colleges were ignored. In addition, 3 questionnaires were returned after the deadline and were ignored as were 8 duplicate responses, where colleges returned multiple questionnaires. The most likely explanation for these 8 duplicates is that the Principals of those colleges in their eagerness to get their questionnaire completed, had asked more than one member of their staff to complete it on their behalf. The result was that 148 responses were returned which could be analysed.

4.2.2 Response rate

The response rate for the three groups of colleges being surveyed were 37 out of a total sample size of 105 (35%) for sixth form colleges, 16 out of a sample size of 34 (47%) for tertiary colleges; and 95 out of a total sample of 240 (40%) for general further education colleges.

CHART 4.1: RESPONDENT COLLEGES BY TYPE

TYPE OF COLLEGE	SAMPLE SIZE	NUMBER OF RESPONSES	RESPONSE RATE
General further education	240	95	40%
Tertiary	34	16	47%
Sixth form	105	37	35%
TOTAL	**379**	**148**	**39%**

The lower than expected response rate may have been due to the late despatch of the questionnaire. Despatching it during the Summer vacation would have ensured a higher response rate as Principals and/or senior staff would have had more time to devote to completing the questionnaire. Secondly, the commercially sensitive nature of some of the data requested may have discouraged some colleges from responding. However, the response rate was broadly in line with the response rate to other AoC questionnaire surveys. The quality of some of the questionnaire responses was poor. Clearly a number of college Principals had delegated the completing of their college's questionnaire to a more junior member of staff. In some cases it was clear that this person was not sufficiently senior to be

able to complete all of the responses in sufficient detail. In two cases colleges refused to complete the questionnaire in full; one because the Principal questioned the statistical validity of the questionnaire, the second because of concerns about the confidentiality of information and the commercial nature of some of the information requested. Another college made the comment that, rather than requesting data for the academic year 1996/7, the questionnaire should have requested 1997/98 data and projections for 1998/99. This college also commented that the British Council would have been able to provide all the information requested in the questionnaire. In response to these points, firstly colleges' data for 1997/8 would not have been subjected to internal audit to satisfy FEFC requirements at the time the questionnaire was completed and, since colleges are notorious for inflating their projections for future student numbers, would not have provided robust data. All the data which was requested would have been subjected to audit at the time the questionnaire was completed. Secondly, neither the British Council nor the DfEE (Department for Education and Employment) collected data in sufficient detail at the time this questionnaire was despatched. At that time, the only data they had available was highly suspect and was for the academic year 1995/6.

4.2.3 Characteristics of colleges responding

The first group of questions on page 1 of the questionnaire sought data on each college in terms of the type of college, the size of college, the

FEFC/Government Office region in which the college was located, the name and job title of the person completing the questionnaire and the date on which it was completed.

The largest number of responses came from medium sized colleges at 54% (80 responses), 28% (41 responses) from small colleges and 18% (27 responses) from large colleges.

CHART 4.2: RESPONDENT COLLEGES BY SIZE	
SIZE OF COLLEGE	**NO**
Small (budget less than £5 million)	41
Medium (budget £5 - £15 million)	80
Large (Budget larger than £15 million)	27
TOTAL	**148**

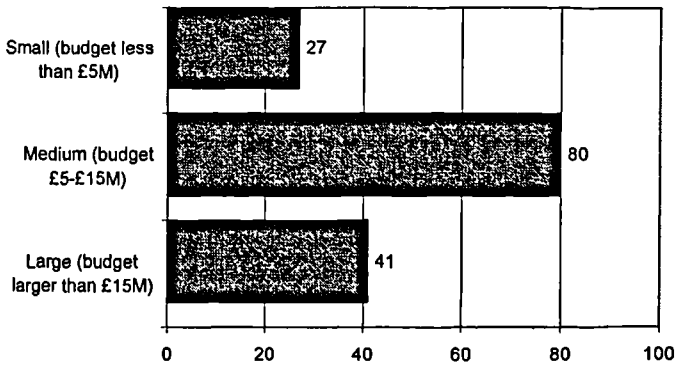


CHART 4.2: RESPONDENT COLLEGES BY SIZE

The largest number of responses by college type came from general colleges of further education at 63% (93 responses), sixth form colleges (including former LEA controlled, voluntary aided and former voluntary controlled) at 25% (37 responses) and tertiary colleges at 12% (18 responses). The level of

responses is possibly explained by the greater numbers of general further education colleges who actively recruit overseas students, the interest some sixth form colleges are now expressing in recruiting overseas students and the fact that tertiary colleges are focussing their activities far more on their local community than on a wider international market.

Geographically by FEFC/Government Office Region, the largest number of responses came from colleges in the West Midlands 16% (23 responses), followed by the South East 15% (22 responses), Greater London 14% (20 responses) and Yorkshire and Humberside 13% (19 responses).

CHART 4.3: RESPONDENT COLLEGES BY LOCATION

FEFC REGION	NO
Northern	7
Eastern	12
East Midlands	14
South West	15
North West	16
Yorkshire and Humberside	19
Greater London	20
South East	22
West Midlands	23
TOTAL	**148**

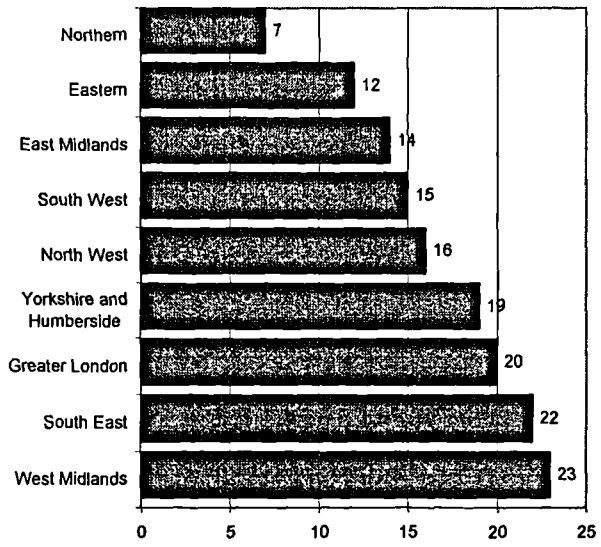


CHART 4.3: RESPONDENT COLLEGES BY LOCATION

4.2.4 Active marketing

Asked whether they were actively marketing their courses overseas (Question 1), 63 colleges (43%) indicated that they were, whereas 85 colleges (57%) indicated that they were not actively marketing their courses and services overseas. This statistic indicates that the further education sector was, prior to 1992, not operating in the way Stubbs (1995) and Crequer (1995) considered a national system of further education should. Each LEA set priorities for its colleges and a uniform approach to issues nationally was missing.

This does not mean that in 57% of colleges overseas students were not recruited, only that those colleges were not actively marketing their courses

and services overseas. A number of the 85 colleges indicated that they recruited overseas students in an untargeted and haphazard way because of the high numbers of minority ethnic groups in their local population. Relatives overseas often sent their sons and daughters to study in the UK, choosing the local college as the most appropriate place in which their relative should choose to study.

Of those colleges not actively marketing their courses and services, the greatest number were small colleges at 76% (n = 31), followed by medium sized colleges at 56% (n = 45), with a smaller number of large colleges not engaging in marketing their courses and services overseas at 33% (n = 9). The greatest percentage of colleges by FEFC region not engaging in overseas marketing were the Northern region at 71%, followed by the North West at 62% and the West Midlands at 61%.

However, these colleges were invited to ignore the rest of the questionnaire and to move to the question asking why they did not actively market their courses overseas (Question 9). This question specifically asked why they did not actively market their courses and services overseas. Of those colleges indicating, 4% (n = 5) said they had already tried marketing their courses and services overseas but unsuccessfully; 15% (n = 17) said that the location of their college was perceived by them as a disincentive to international student recruitment; 34% (n = 39) indicated that other recruitment activities took precedence and 47% (n = 54) indicated that their college's strategic plan was totally focussed on the home market.

CHART 4.4: RESPONDENTS' REASONS FOR NOT MARKETING THEIR COURSES AND SERVICES OVERSEAS	
REASON FOR NOT MARKETING COURSES OVERSEAS	**NO OF TIMES RESPONSE MADE**
The college's strategic plan is focussed on other markets	54
Other recruitment activities take priority	39
The geographical location of the college	17
Have already tried but unsuccessfully	5

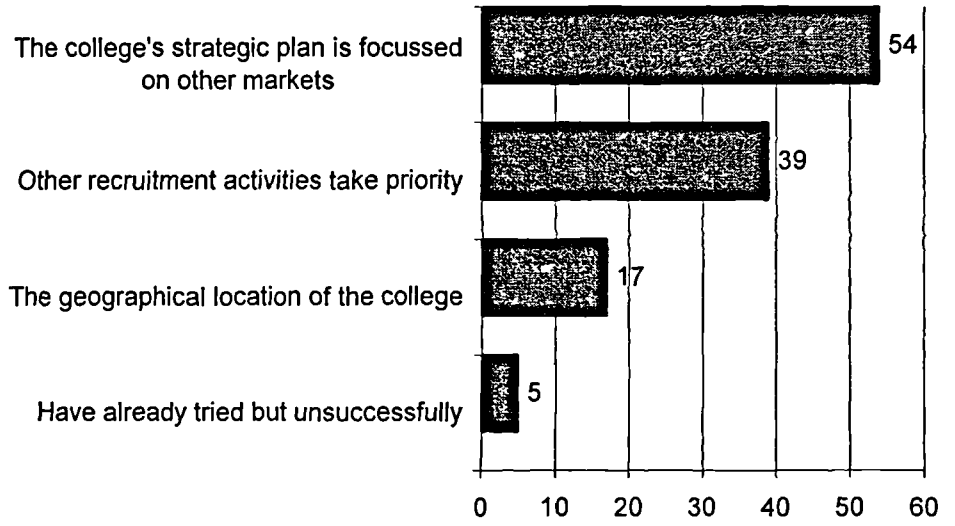


CHART 4.4: RESPONDENTS' REASONS FOR NOT MARKETING THEIR COURSES AND SERVICES OVERSEAS

The location question was particularly interesting, as the greatest number of colleges citing location as a reason for not marketing their courses and services overseas were from the FEFC's Northern region at 29% (n = 2), followed closely by the South West at 27% (n = 4) with Yorkshire and Humberside at 16% (n = 3). The greatest number of colleges actively recruiting students from overseas were the East Midlands region with 64% (n = 9) of respondents indicating active recruitment, followed by the South West

at 47% (n = 7) and Yorkshire and Humberside and the Eastern region with 42% (n = 8 and n = 5 respectively) of colleges indicating overseas student recruitment. It would have been reasonable to have seen the South East, East Anglia and South West regions as having, in potential students' minds, the most positive features in terms of their location, and the East Midlands, Northern, and Yorkshire and Humberside regions as having, in potential students' minds, the least popular location features. The lure for overseas students of studying in London did not appear to impact upon responses at all.

Anecdotal evidence would suggest that a higher number of colleges have already tried marketing overseas, but abandoned it because it was unsuccessful. The greatest number of colleges responding that they did not market overseas was from the West Midlands 12% (n = 14), the South East 11% (n = 13) and Greater London 10% (n = 12), not areas that would generally be perceived as unattractive to students from overseas.

Colleges were also invited to make general comments about why they did not market their courses and services overseas. Disincentives to beginning overseas recruitment were cited as: the cost of overseas marketing; the administrative effort that has to be put into responding to overseas student applications, often with no resulting enrolment; the possible disincentive to overseas students of the high level of fees; the limited availability of local accommodation for students; the uncertainty about whether overseas student recruitment is profitable or a drain on college resources; that home market

student recruitment was particularly buoyant; that accommodation was already in short supply without exacerbating it further by increasing student numbers; and that a number of the colleges responding were happy to engage in passive overseas student recruitment, but did not want to engage in active recruitment overseas and engage in the costs associated with such a strategy. A number of colleges indicated that they were constantly reviewing their position on overseas student recruitment and two colleges indicated that they were about to embark on a programme of international student recruitment within the next year.

Of the 63 colleges who responded indicating that they did actively market their courses and services overseas, 56% (n = 35) were medium sized colleges, 29% (18 responses) were large colleges and 16% (n = 10) were small colleges. The vast majority at 83% (n = 52) were general further education colleges, with only 10% (n = 6) being sixth form colleges and 8% (n = 5) being tertiary colleges.

CHART 4.5: NUMBER OF COLLEGES ACTIVELY MARKETING THEIR COURSES AND SERVICES OVERSEAS —BY COLLEGE TYPE			
TYPE OF COLLEGE	**TOTAL RESPONSE**	**ACTIVELY MARKETING**	**PERCENTAGE**
General further education	95	52	55
Tertiary	16	5	31
Sixth form	37	6	16
TOTAL	**148**	**63**	**43**

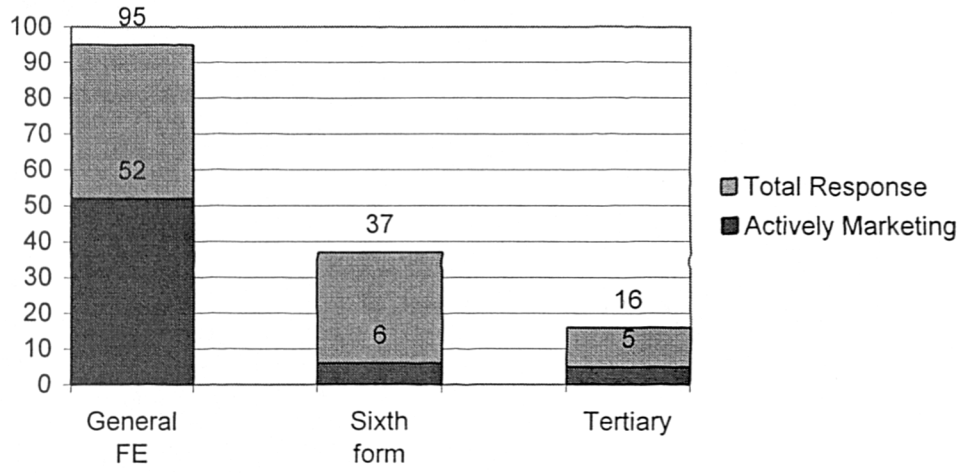


CHART 4.5: NUMBER OF COLLEGES ACTIVELY MARKETING THEIR COURSES AND SERVICES OVERSEAS – BY COLLEGE TYPE

CHART 4.6: NUMBER OF COLLEGES ACTIVELY MARKETING THEIR COURSES AND SERVICES OVERSEAS —BY FEFC REGION			
FEFC REGION	**TOTAL RESPONSE**	**ACTIVELY MARKETING**	**PERCENTAGE**
Northern	7	2	29
Eastern	12	5	42
East Midlands	14	9	64
South West	15	7	67
North West	16	6	38
Yorkshire and Humberside	19	8	42
Greater London	20	8	40
South East	22	9	41
West Midlands	23	9	39
TOTAL	**148**	**63**	**43**

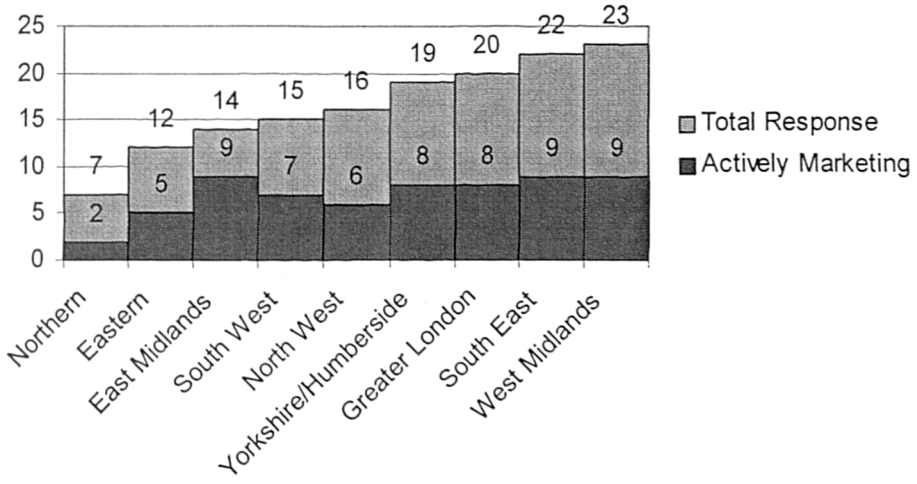


CHART 4.6: NUMBER OF COLLEGES ACTIVELY MARKETING THEIR COURSES AND SERVICES OVERSEAS

Anecdotal evidence would have suggested that a larger number of sixth form colleges would have been marketing their courses overseas, particularly as they would be well placed to provide the GCSE and A level courses much in demand by students from overseas countries. Whilst large and medium sized

colleges would be able to offer the range and breadth of courses in technology, specifically engineering, that would be popular with overseas students, many would find it difficult to offer academic courses, such as A levels, favoured by overseas students. Of those colleges marketing overseas, 14% (9 responses) were in the South East, 14% (n = 9) in the East Midlands and 14% (n = 9) in the West Midlands.

It is interesting to contrast the significant involvement of colleges in international student recruitment when compared with the views of Bristow (1970) who saw further education having as its clear focus the provision of education and training for the College's local community. Clearly a significant number of colleges have moved from further education's original mission to a wider mission focussing on more diverse markets.

4.2.5 Experience of overseas student recruitment and motivation

Asked how long they had been passively recruiting and, secondly, actively marketing (Question 2(a)), the vast majority 27% (n = 16) indicated that they had been passively recruiting overseas students for in excess of 24 years, followed by colleges which had been passively recruiting for between one and four years at 24% (n = 14) and 20% of colleges (n = 12) having been engaged in passive recruitment for between five and eight years. The largest number 41% (n = 23) had been actively marketing for between one and four years, with 25% (n = 14) having been actively marketing for between five and eight

years and 16% (n = 9) having been actively marketing for between nine and 12 years.

CHART 4.7: LENGTH OF TIME COLLEGES HAVE BEEN PASSIVELY RECRUITING AND ACTIVELY MARKETING THEIR COURSES AND SERVICES OVERSEAS

LENGTH OF TIME PASSIVELY RECRUITING OVERSEAS	NO OF RESPONSES	LENGTH OF TIME MARKETING OVERSEAS	NO OF RESPONSES
21-24 years	2	21-24 years	2
17-20 years	3	17-20 years	2
13-16 years	4	in excess of 24 years	3
9-12 years	8	13-16 years	3
5-8 years	12	9-12 years	9
1-4 years	14	5-8 years	14
in excess of 24 years	16	1-4 years	23

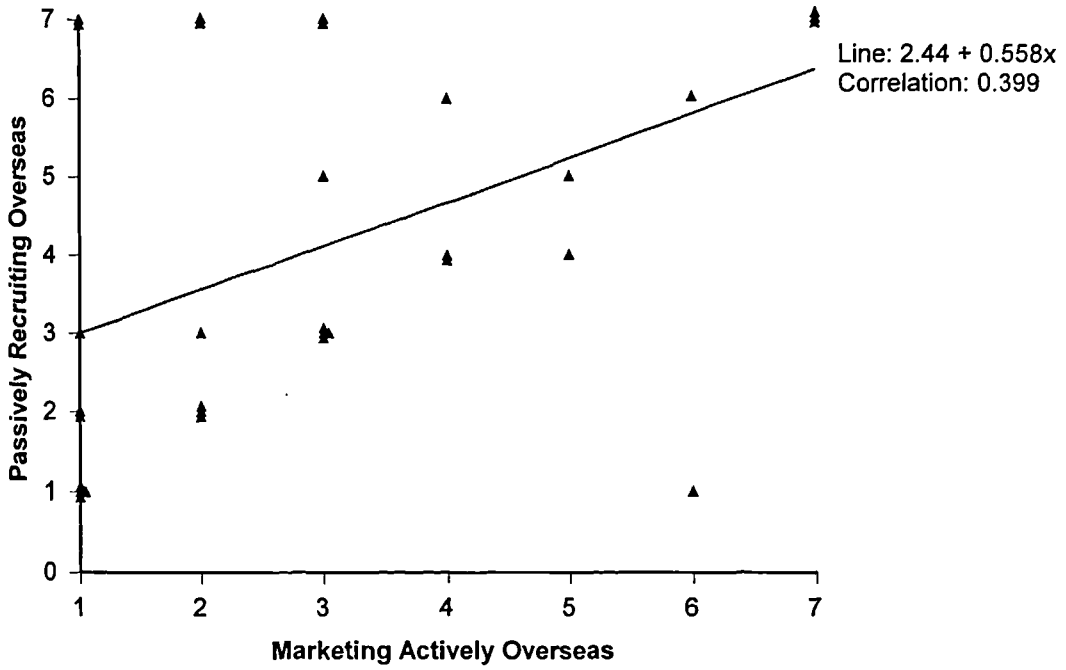


CHART 4.8: CORRELATION BETWEEN COLLEGES PASSIVELY RECRUITING OVERSEAS AND ACTIVELY MARKETING OVERSEAS

Correlating data for the number of years colleges had been passively recruiting overseas students and relating that to the number of years colleges had been actively recruiting overseas students, there appears at 0.399 to be a relatively weak correlation between the two. A larger return rate on the questionnaires may have led to a more significant correlation as it would have been reasonable to assume that the initial spur for colleges beginning formalised international student recruitment would have been an existing experience of passively recruiting international students.

Determining colleges' motivation for beginning to recruit overseas students (Question 2(b)) brought a variety of responses. Ecclesfield (1987) proposed six reasons for colleges embarking on overseas recruitment. However, his list is insufficiently institutionally focussed and considers issues that fall outside of the needs of the institution. These responses are not mutually exclusive and

colleges may have made multiple responses to this question. Of those colleges who made a response, 41% (n = 64) indicated that it was to diversify their college's income base and to become less reliant on Further Education Funding Council (FEFC) funding; 31% (n = 49) indicated that it was to add an international dimension to their college's work; 18% (n = 28) to promote a unique curriculum area that the college had to offer, and 10% (n = 16) indicated that it was to preserve an existing area of the college's work which was in decline in the home market.

CHART 4.9: COLLEGES' REASONS FOR BEGINNING TO MARKET THEIR COURSES AND SERVICES OVERSEAS

REASON	NO OF TIMES RESPONSE MADE
Preserve existing curriculum provision	16
Promote a unique curriculum area overseas	28
Add an international dimension to the college's work	49
Diversify the college's income base	64

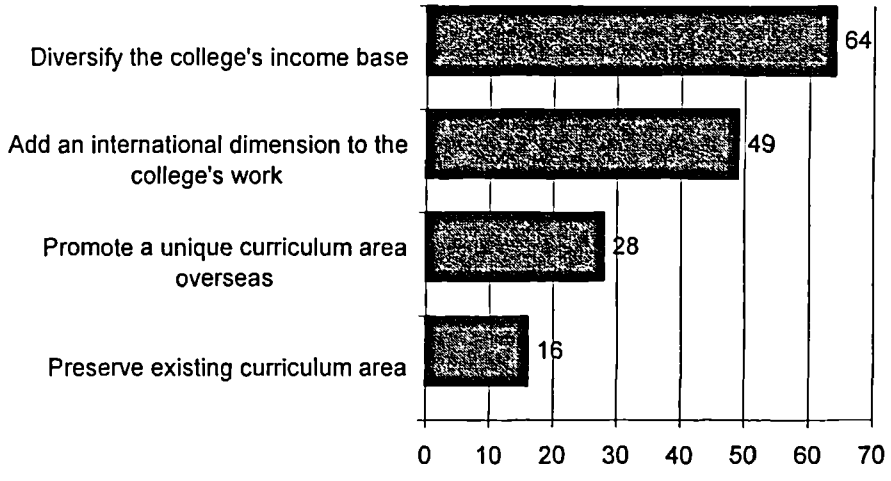


CHART 4.9: COLLEGES' REASONS FOR BEGINNING TO MARKET THEIR COURSES AND SERVICES OVERSEAS

The relatively small number of responses to the question relating to preserving an existing area of the college's work which is in decline in the home market, was surprising. Anecdotal evidence would suggest that this was one of the early factors which encouraged colleges to begin international student recruitment. Overseas student recruitment was seen as a relatively easy response to a decline in home market demand for a particular course area. Certainly the case study by Hall cited by Parkes (1988) highlighted the problems faced by one Local Education Authority in responding to a significant local decline in demand for its traditional day release courses. This case study could not have been unique and even in the LEA in question (Birmingham), international student recruitment was used to preserve existing course provision.

4.2.6 Overseas student enrolments

Colleges were asked to indicate on which courses and in which curriculum areas their overseas student enrolments were located (Question 3). A difficulty with the responses to this question is the accuracy with which colleges have collected the data and a number of respondents indicated difficulty in collecting the required data. However, during the pilot testing of the questionnaire it became clear that the data requested was easily extracted from the FEFC's Individual Student Record (ISR) database, which each college has to maintain in order to access FEFC funding. The responses received may indicate the poor levels of sophistication in many colleges'

management information systems and the systems' inability to provide basic data. The questions also required that part-time student enrolments were converted into full-time equivalents using accepted rates of conversion. Again this may have caused problems for some colleges and only broad trends can realistically be deduced from the responses to Question 3. The most popular course was the short EFL (English as a Foreign Language) course with 41% of all enrolments being in this area; 12% for short vocational courses for overseas students; 10% for BTEC Higher National Diploma courses, and 6% for A level courses.

CHART 4.10: NUMBERS OF ENROLMENTS OF OVERSEAS STUDENTS IN COLLEGES BY COURSE AREA

ENROLMENTS BY COURSE AREA	NO OF FTE ENROLMENTS	%AGE OF TOTAL
Short EFL courses	2535	41
Short vocational courses	733	12
BTEC Higher National Diplomas	633	10
A levels	390	6
Discrete long courses	388	6
BTEC National Diplomas	320	5
GNVQ Advanced	269	4
NVQs	238	4
Overseas Access to HE	227	4
BA/BSc degrees	214	3
GNVQ Intermediate	132	2
GCSE	128	2
TOTAL	**6207**	

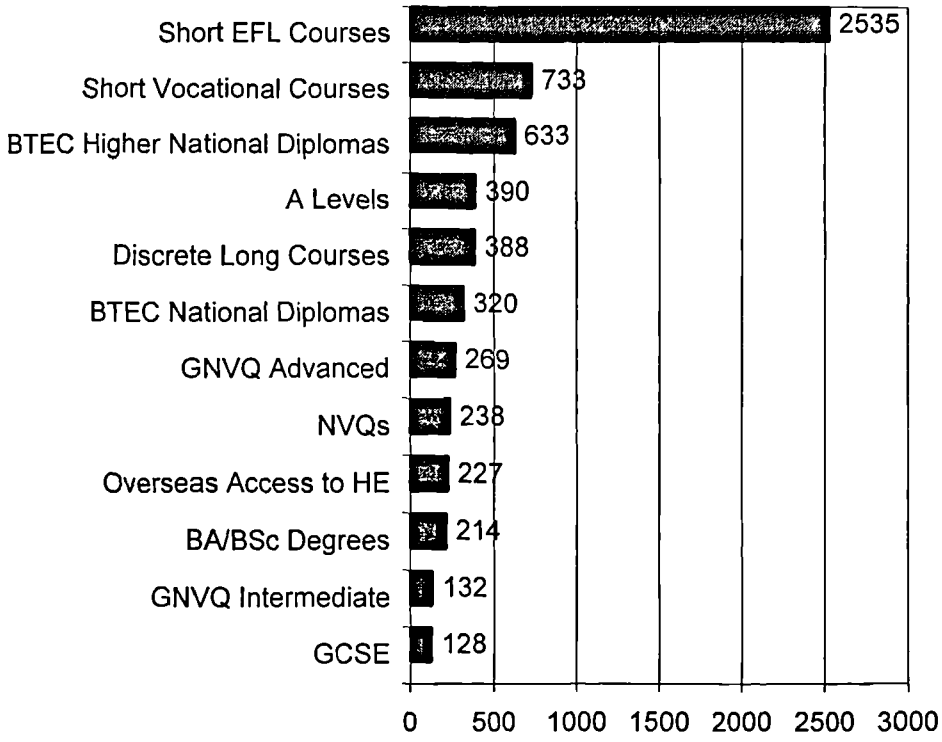


CHART 4.10: NUMBERS OF ENROLMENTS OF OVERSEAS STUDENTS BY COURSE AREA

Those colleges actively recruiting overseas students would generally see a foundation programme of EFL as being a fundamental part of building a wider programme of overseas student enrolments. EFL courses and short vocational courses provide an introductory course in many colleges prior to an overseas student taking an A level or vocationally focussed course. Other responses from colleges under the 'Others please specify' course heading mainly included a variety of secretarial and administration courses.

Colleges were also asked to indicate in which broad curriculum areas overseas students were enrolled. Accepting the same qualification on data accuracy as before, by far the greatest number (38%) were enrolled in the

EFL area, followed by engineering (20%); sciences (10%), and business studies (9%). These curriculum areas have traditionally been popular with overseas students, as there is a ready demand for these skills in those countries traditionally sending students to study in England. Furthermore, English colleges are seen as having a ready expertise in these areas.

CHART 4.11: NUMBERS OF ENROLMENTS OF OVERSEAS STUDENTS IN COLLEGES BY CURRICULUM AREA

ENROLMENTS BY CURRICULUM AREA	NO OF FTE ENROLMENTS	% AGE OF TOTAL
EFL	2058	38
Engineering	1088	20
Sciences	536	10
Business studies	532	10
Hotel and catering	483	9
Humanities	352	7
Art and design	208	4
Health and community care	66	1
Construction	60	1
Agriculture	5	0
TOTAL	**5388**	

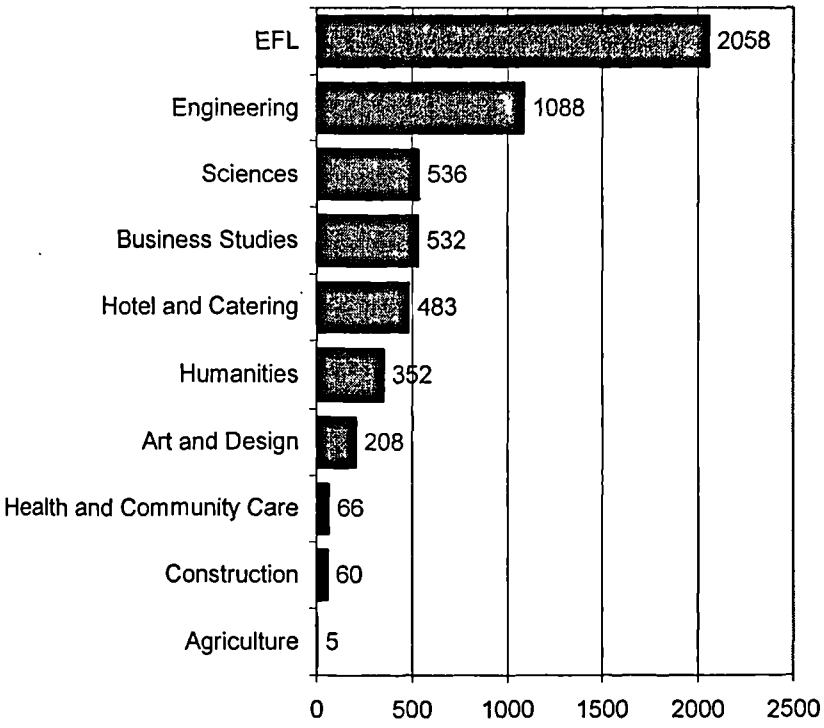


CHART 4.11: NUMBER OF ENROLMENTS OF OVERSEAS STUDENTS IN COLLEGES BY CURRICULUM AREA

Other curriculum areas specified by colleges under the 'Others please specify' category included courses in printing and packaging, marine engineering and aeronautical engineering. These courses are all offered by a small number of colleges but they have developed their expertise in these areas and marketed their courses overseas. Discrepancies between the total numbers of students enrolled by course area and by curriculum area is explained by some colleges' lack of accuracy in completing their questionnaire.

It is difficult to relate data supplied by the FEFC to The British Council with the above data owing to the aggregate nature of the FEFC's data. Their figures include data for Scotland, Northern Ireland and Wales in addition to England

and enrolments from all types of colleges were included in their data, not just from general further education, tertiary and sixth form colleges, as in this survey.

4.2.7 Overseas income and marketing expenditure

Colleges were asked to indicate (a) what percentage of the college's gross income in 1996/7 was derived from the recruitment of non-EU students and (b), what percentage of their college's total marketing budget was devoted to the marketing of courses to students from non-EU countries (Question 4). The responses to (a) were ranged between 20% and zero percent of the college's gross income with a median average of 3% and to (b), between 60% and zero percent of their college's marketing budget, with a median average of 13%. Whilst there is no direct relationship between these two variables, it would be reasonable to expect that a college generating a significant percentage of its income from overseas students would devote a similarly significant percentage of its marketing budget to overseas student recruitment.

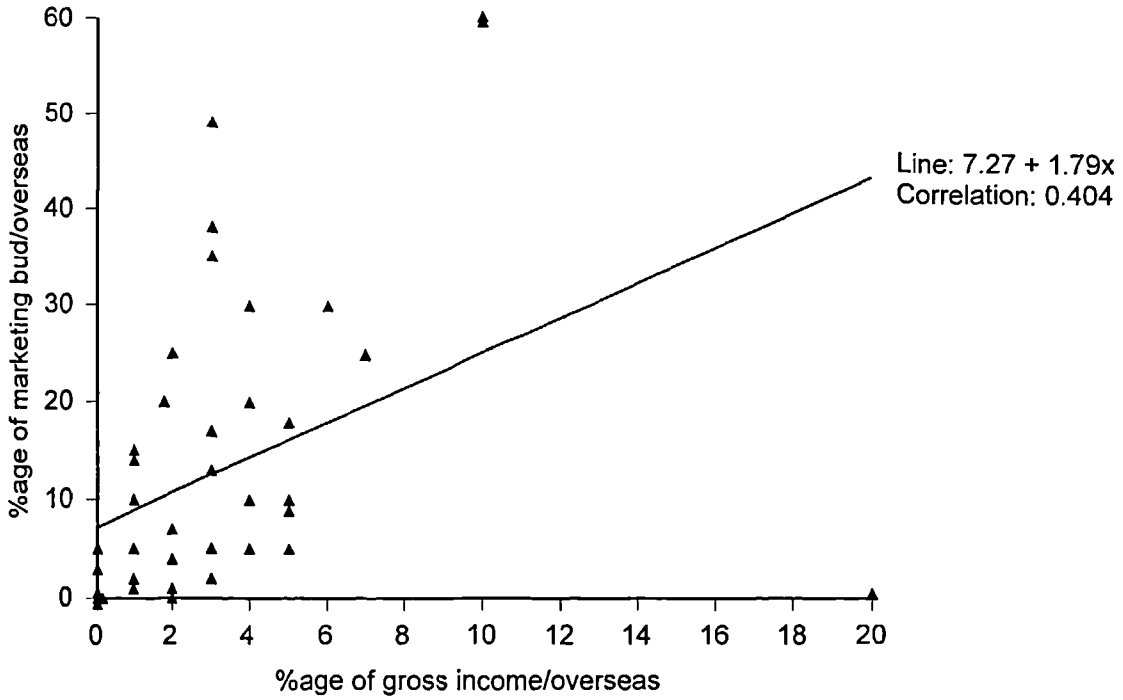


CHART 4.12: COLLEGES' PERCENTAGE OF TOTAL INCOME FROM OVERSEAS AND PERCENTAGE OF MARKETING BUDGET INVESTED OVERSEAS:

From the limited data collected, there appears to be a relatively weak correlation (+ 0.404) between the size of the colleges' overseas marketing budgets and the percentage of the colleges' gross income derived from international student recruitment. This perhaps indicates that colleges begin to rely on their overseas student income without committing the necessary investment in marketing to support and develop the generation of that income.

4.2.8 Target markets

Colleges were invited to indicate the countries in which they were actively marketing their courses and services and the numbers of students enrolled from each of those countries (Question 6). The four most popular countries targeted for recruitment activities were Hong Kong (30 colleges); Japan (23 colleges); China (21 colleges), and the Gulf States (17 colleges). Least popular, from the list provided were Syria (no colleges); South Africa (1 college); Nigeria (1 college), and the USA (2 colleges). Countries which colleges were targeting for recruitment activities but which were not offered as one of the multiple responses to Question 6(a) were Taiwan and Thailand. The survey showed colleges' preference for targeting their recruitment activities towards the Far East followed by the Middle East, with Africa and South America hardly being targeted at all.

CHART 4.13: COUNTRIES TARGETED FOR MARKETING ACTIVITIES (FROM LIST OFFERED)

COUNTRIES TARGETED	NO OF RESPONSES	COUNTRIES TARGETED	NO OF RESPONSES
Syria	0	Oman	9
South Africa	1	India	11
Nigeria	1	South Korea	12
USA	2	Brazil	13
Ghana	2	Malaysia	17
Qatar	3	Gulf States	17
Morocco	3	China	21
Kenya	6	Japan	23
Indonesia	6	Hong Kong	30

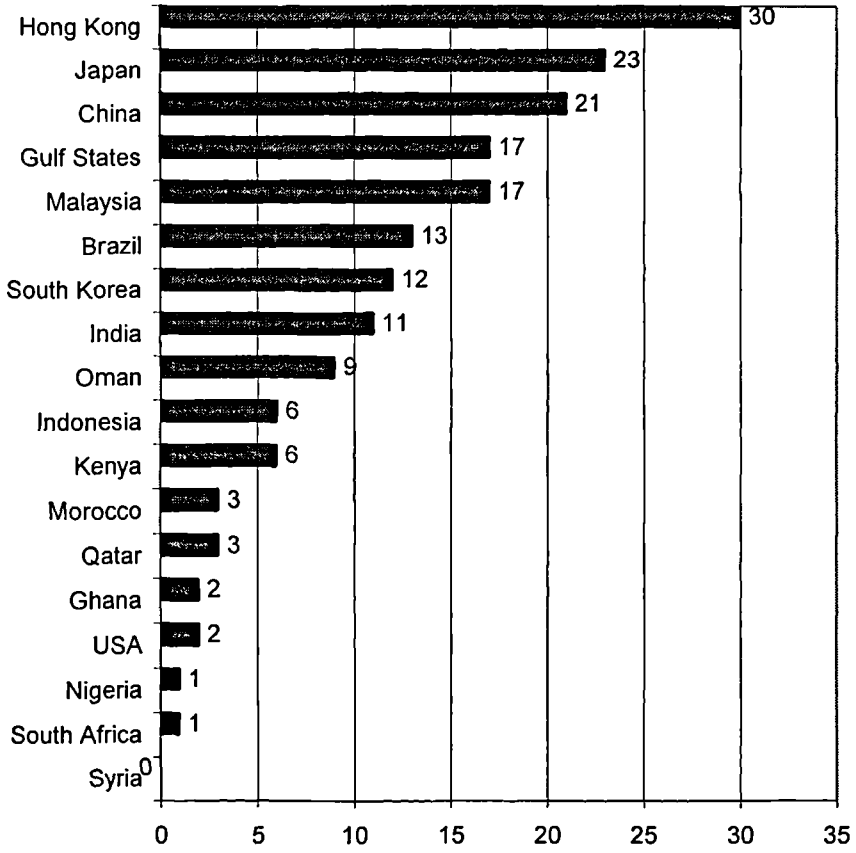


CHART 4.13: COUNTRIES TARGETED FOR MARKETING ACTIVITIES

4.2.9 Students' country of origin

The largest numbers of students were recruited from Japan (713); Hong Kong (400); India (351), and South Korea (240). The smallest numbers were recruited from Syria (3); Qatar (3); South Africa (11) and Morocco (15).

CHART 4.14: STUDENTS' COUNTRY OF ORIGIN (FROM LIST OFFERED)			
COUNTRY OF ORIGIN	FTE ENROLMENTS	COUNTRY OF ORIGIN	FTE ENROLMENTS
Syria	3	Oman	66
Qatar	3	Brazil	93
South Africa	11	China	149
Morocco	15	Gulf States	207
Ghana	16	Malaysia	236
Indonesia	17	South Korea	240
USA	22	India	351
Nigeria	34	Hong Kong	400
Kenya	64	Japan	713

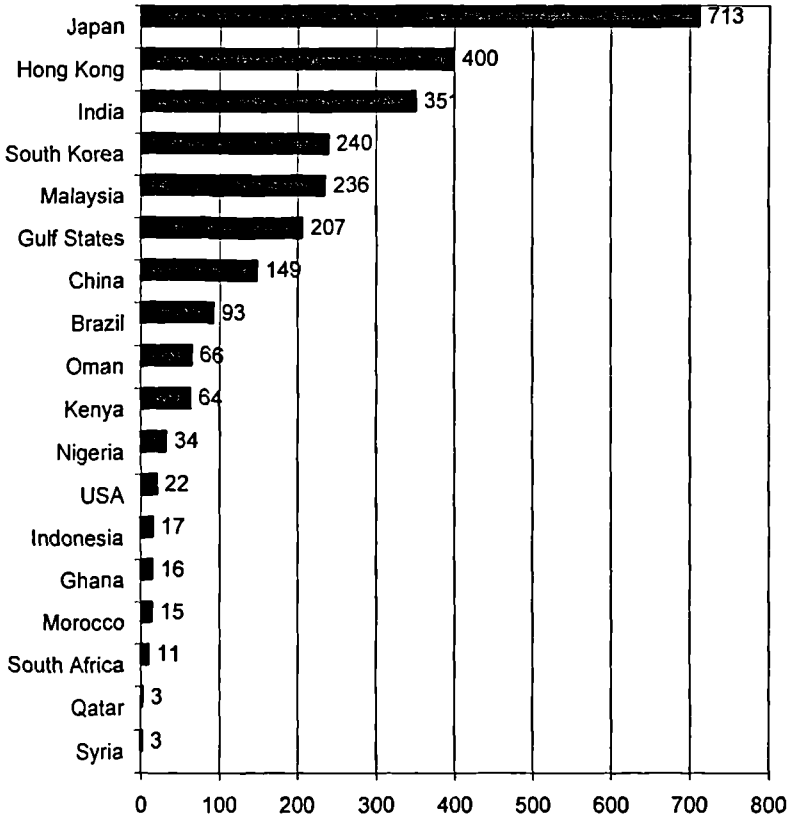
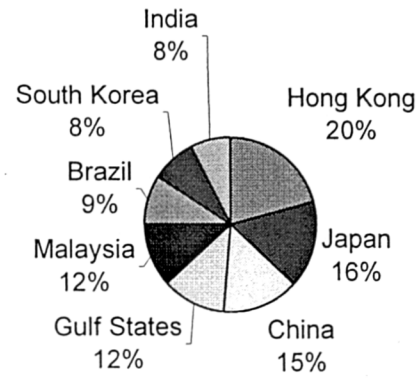


CHART 4.14: STUDENTS' COUNTRY OF ORIGIN (FROM LIST OFFERED)

COUNTRIES TARGETED



STUDENTS ENROLLED

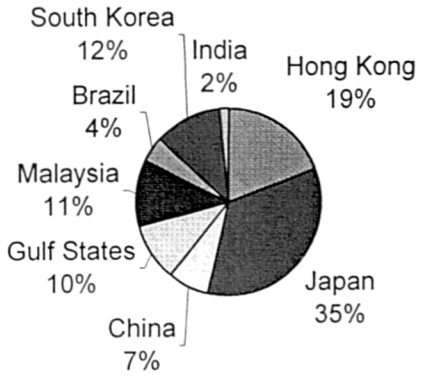


CHART 4.15: TOP EIGHT COUNTRIES TARGETED FOR MARKETING ACTIVITIES COMPARED WITH ENROLLED STUDENTS BY COUNTRY (%AGE)

The large numbers of students from Japan and South Korea would be explained by those countries' demand for EFL courses; Hong Kong explained by its traditional links with the UK and long standing history of being a strong recruitment market for English colleges. India may well be explained by colleges' local minority ethnic population's connections with the country. These figures are partially supported by aggregate data supplied by the Department for Education and Employment (DfEE) (1997) which showed Japan, Greece, India, Hong Kong, Pakistan and South Korea as the countries from which English colleges recruited the largest number of overseas further education students. However, on checking the DfEE's data it is clear that their figures are inaccurate as the data's source is the Further Education Funding Council's Individual Student Record (ISR) which a significant number of colleges do not complete in sufficient detail for the resulting aggregate data to be accurate. Of overseas students studying on higher education courses in further education colleges, the DfEE's figures showed that Malaysia, Hong Kong, Saudi Arabia, Greece and Oman were the countries from which the greatest numbers of students came.

Colleges were asked if they had entered into contracts with overseas commercial/industrial organisations for the training of overseas students in vocationally related skills (Question 7). Thirty-six colleges (60%) of those responding indicated that they had, with 24 colleges (40%) indicating that they had not entered into such contracts. Those colleges entering into these types of contracts would be making major financial commitments to the international

student market and could be perceived as having made a long-term commitment to overseas student recruitment.

4.2.10 Membership of support organisations

An attempt was made to gauge the numbers of colleges who were members of the four main organisations supporting colleges in their overseas student recruitment, and the benefits the colleges perceived that they got from their membership of these organisations (Question 5). Of those responding, 21 colleges (34%) indicated that they were members of the British Association of State Colleges in English Language Training (BASCELT), with eight (44%) rating the organisation Very Good; seven (39%) Good; three (17%) Average and none rating BASCELT as Poor.

CHART 4.16: PERCEPTIONS OF THE VALUE OF BASCELT MEMBERSHIP

RATING	NO OF RESPONSES
Poor	0
Average	3
Good	7
Very Good	8

Twenty-seven colleges (43%) indicated that they were members of Education Counselling Services (ECS), with four (15%) rating the organisation Very

Good; 12 (46%) rating the organisation Good; nine (35%) rating it as Average; and one (4%) rating it as Poor.

CHART 4.17: PERCEPTIONS OF THE VALUE OF ECS MEMBERSHIP	
RATING	**NO OF RESPONSES**
Poor	1
Very Good	4
Average	9
Good	12

Membership of the United Kingdom Council for Overseas Student Affairs (UKCOSA) was indicated by 41 colleges (65%); 13 (32%) rating it as Very Good; 18 (44%) as Good; 10 (24%) as Average and none as Poor.

CHART 4.18: PERCEPTIONS OF THE VALUE OF UKCOSA MEMBERSHIP	
RATING	**NO OF RESPONSES**
Poor	0
Average	10
Very Good	13
Good	18

Only two colleges indicated membership of the International Vocational Education and Training Association (IVETA), both rating the organisation as Poor.

Clearly UKCOSA is viewed most favourably by colleges, followed by BASCELT and then ECS.

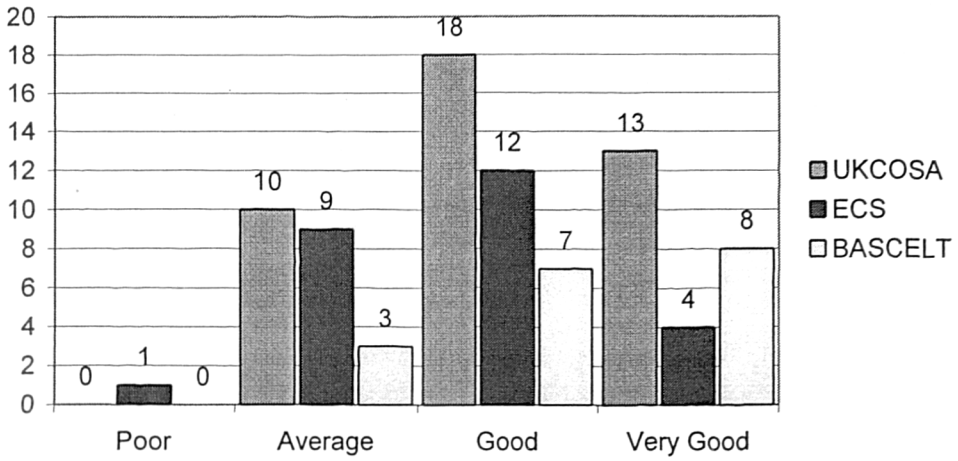


CHART 4.19: PERCEPTIONS OF THE VALUE OF THE MEMBERSHIP OF THE THREE ORGANISATIONS

The only previous research on further education colleges' perception of private and public agencies assisting in overseas student recruitment was conducted by Silver (1994) but remains unpublished. In that 350 colleges were surveyed with 130 of them making a response to the research instrument. The bulk of the respondent colleges had little or no experience of overseas student recruitment and were generally disappointed with the level of state and other support available to them. There was also a frustration expressed by respondents to Silver's research that the state and other bodies were staffed by individuals who had little or no experience of the further education sector.

4.2.11 General comments

Colleges were given the opportunity to make any other comments they felt appropriate but which they were not able to incorporate anywhere else in the questionnaire (Question 10). A number of colleges who actively recruited overseas students did so from a very wide variety of countries, some indicating enrolments from in excess of 24 different countries. The importance of local family and business connections should not be underestimated as a tool for assisting recruitment. Active links with EU countries were cited by a number of colleges even though this research was concerned only with students recruited from outside the EU. A number of colleges indicated successful collaborative partnerships with privately owned language schools in the UK and the benefits that could be derived from working together.

Colleges were finally given an opportunity to indicate whether they would be willing to be involved in follow-up work to the questionnaire (Questions 8(a) and (b)). Fifty Colleges indicated that they would be prepared to take part in the qualitative interview phase of the research.

4.3 THE FOUR INSTITUTIONAL CASE STUDIES

The qualitative interview phase of this research aimed to explore the issues in rather more depth than the quantitative questionnaire responses could, especially in regard to questions two and three posed at the beginning of this research. Questions two and three concerned the motivation for English colleges of further education to begin recruiting non-EU students, and what were the most successful techniques used by those colleges in the recruitment process. In addition, the qualitative interviews addressed a range of managerial and other issues which impacted upon international student recruitment, and they are also reported here.

4.3.1 Research sample

Once all of the questionnaire responses had been analysed, it was decided to select four colleges with whom to conduct a set of structured interviews. In order to get a sufficient understanding of the college's international work in general, and international student recruitment in particular, it was decided that it would be necessary to visit each college for two full days and to interview the Principal, the senior manager responsible for international student recruitment, a Head of Department, the member of staff responsible for international student welfare and, if possible, a representative of the college's Governing Body. Each college was acquainted with the types of interviews that would be conducted over the two days and were also invited to provide a group of international students who could also be interviewed. All of the four

colleges were guaranteed absolute anonymity with an undertaking that their names would not be shared with other colleges being interviewed and that they would not be identified, however obliquely, in any of the research which was either written-up or published. The interview phase of this research was limited to four colleges by the researcher's time, the willingness of colleges who were approached to commit time to such research and the cost limitations of a programme of sustained visits to a larger sample of colleges. Initially three colleges were approached to participate, firstly by letter followed ten days later by a telephone call to the Principal. All of the colleges approached had responded to the initial quantitative questionnaire survey and had indicated that they would be willing to participate in the further qualitative research. One of the three colleges responded positively, but two declined to participate on the grounds that they were experiencing difficulties relating to internal re-organisations, which made it impossible for them to commit the time of senior managers or a governor to the research. Subsequently another three colleges, all of whom had completed the initial questionnaire and had again indicated that they were willing to participate in further research, were approached. They agreed and, along with one of the first three colleges who had agreed to participate, made up the sample of four colleges. Two of the colleges were located in the FEFC's West Midlands region, the other two in the FEFC's South East region. Whilst it would have been preferable to have selected a sample of colleges in four different FEFC regions to ensure a wider geographical spread, this did not prove possible owing to difficulties in assembling the sample group of colleges.

Of the final sample of four colleges, all are considered by the FEFC to be medium sized, that is having a gross budget of between £5 and £15 million. In addition, all have a diversity of income of greater than 30%, meaning that 70% or less of their income derives from the FEFC and that they are well experienced at generating operating income from other sources. All four colleges have a significant track record of recruiting international students amongst a range of other international work, indicating that they would have sufficient expertise to be able to offer insights into the international student recruitment process. As the bulk of the colleges responding to the initial questionnaire were general, medium sized, further education colleges, the sample of four is representative of that wider survey. None of the sample colleges was judged by the DfEE/FEFC to be either "failing", experiencing severe financial difficulties or to have major outstanding issues concerning its quality rating. Sadly only one of the four colleges had been subjected to a second-round FEFC inspection, therefore it is impossible to tabulate comparative inspection data for the four colleges. Inspection data from the first round of FEFC inspections is now at least five years out of date and was collected using a former inspection framework, which has now been superceded by a self-assessment model of inspection.

The meetings with key individuals in each college consisted of a structured interview lasting approximately 45 minutes with the responses to the twelve main questions and other supplementary questions being recorded on a pro-forma interview record.

Interviewees were invited to provide a range of printed materials to support their responses to the structured questionnaire, which generally included a copy of the college's international marketing plan, details of international student enrolments, copies of all printed publicity used overseas and any other documentation the college felt might be useful to the interviewer.

In only one college were arrangements made for two groups of international students to be interviewed. However, owing to the students' limited grasp of English, the information gained from these interviews yielded few insights. Interestingly, none of the colleges were able to provide copies of student satisfaction surveys for international students. It appeared that the colleges' student satisfaction surveys were administered only to home, and not to international, students. This possibly resulted from overseas students falling outside the remit of the FEFC's Student Charter, the provisions of which are targeted entirely at FEFC funded students.

With the exception of each college's senior manager responsible for international recruitment, the interviewees' detailed level of knowledge of international work was limited. In addition, the turnover of staff at senior levels in the colleges meant that, in all colleges, only one of those senior managers interviewed had any detailed understanding of the background to the college's involvement in international work. These two points are perhaps indicative of a difficulty in conducting this type of research. Firstly, a wide range of staff is involved in international work but the majority only have a very generalised knowledge of it, and secondly, the significant turnover in

senior managers in further education colleges since incorporation has reduced the numbers of long-serving managers appointed pre-incorporation.

CHART 4.20: DETAILS OF THE FOUR COLLEGES

	FEFC funding allocation 1998/9 (£) (1)	Full-time students (2)	Part-time students (2)	Overseas students (FTEs) 1997/8 (3)
College A	11,694,111	2,867	7,827	83
College B	12,324,910	2,860	10,656	131
College C	7,169,416	1,507	5,736	136
College D	11,498,323	2,113	10,945	120

Sources:

1 Funding Allocations 1998/9 (1999) Further Education Funding Council: Coventry

2 Performance Indicators 1996/7 (1998) Further Education Funding Council: Coventry

3 College records

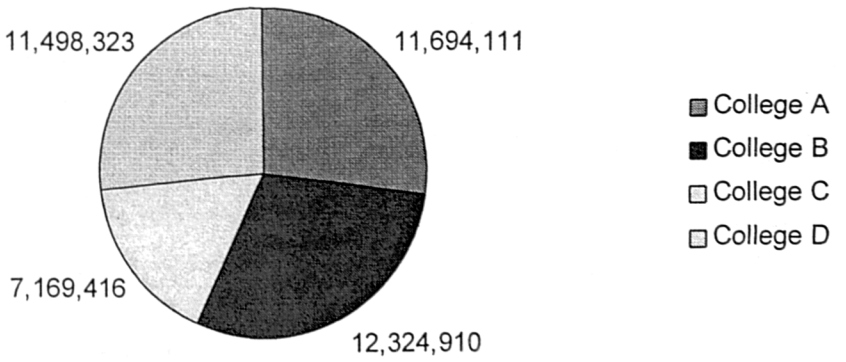


CHART 4.21: COLLEGE FUNDING ALLOCATIONS (£M) 1998/9

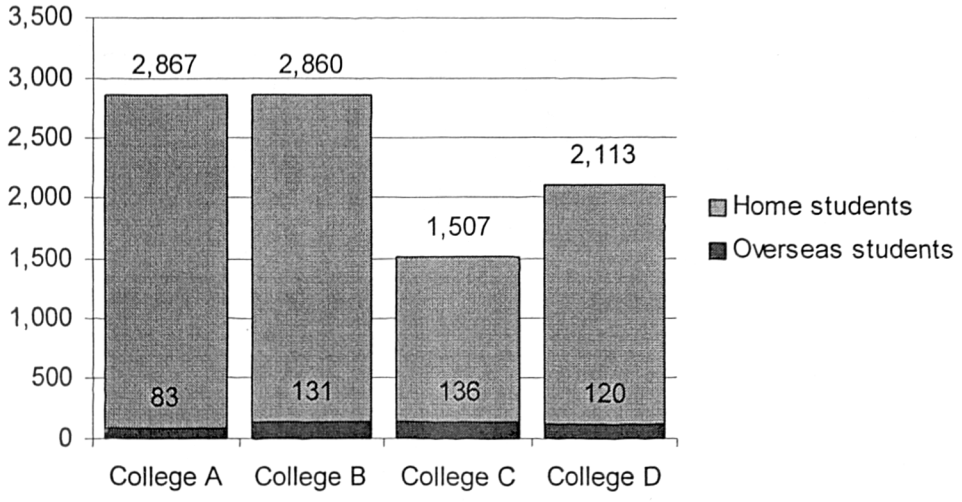


CHART 4.22: COMPARISON OF COLLEGES' FULL-TIME STUDENTS: HOME AND OVERSEAS

4.4 FOUR INSTITUTIONAL CASE STUDIES: RESULTS

4.4.1 Types of international work

All of the four colleges which participated in the case study phase of this research were involved in a wide range of international work including working with a wide variety of students from overseas, or enabling home-based students to experience an international dimension to their studies. The recruitment of overseas students to study in the UK was but one part of the colleges' portfolio of international work.

The Principal of College A categorised his college's overseas work as follows:

> *"We operate in three ways internationally; we organise exchanges and visits overseas for our home-based students; we use EU funds to fund various types of international work, and we recruit students from overseas to study in the College. We have*

delivered some courses overseas but now see this as too risky a venture."

The Marketing Manager in College C also categorised his college's overseas work similarly but added:

"Overseas exchanges and visits don't really earn us any income; they are just an enhancement to existing home – students' programmes of study. The real income comes from recruiting students from overseas onto courses here, EU funded activities and, if we get the chance, delivering courses overseas."

We need to analyze these four major types of activity in more detail. The first, the adding of an international dimension to courses for home-based students, usually involves visits overseas or exchanges with colleges overseas. The colleges engaged in this work to broaden students' experiences on their particular course and to locate their studies in an international context, or to enhance the appeal of a particular course to potential applicants. This work was often undertaken with students funding the cost of their own international learning experience(s); in other instances EU or other external funding was used to support a course's international dimension.

The second broad type of international work, that of EU-funded activities consists of three parts. Firstly, colleges were providing trans-national enhancements to existing course programmes funded by the EU or one of its subsidiary agencies. Secondly, colleges were facilitating more substantial links and exchanges between staff and students in colleges in the UK and overseas, again funded by the EU or one of its agencies. Thirdly, colleges were targeting home-based courses to particular groups of students, usually

from disadvantaged groups using EU funding in the form of the European Social fund (ESF) where additional FEFC funding for such links was not available. The Principal of College C commented:

> *"We have never made any money out of EU funded activities and, frankly, the paperwork is a nightmare".*

Both the Principals from Colleges A and B expressed concern about relying too heavily on EU funded work for two reasons. The Principal from College B summed it up:

> *"There have been so many problems keeping track of EU funds to satisfy auditors and the bureaucracy needed to bid for and account for funds is so extensive, that we have tried to contain our EU funded work to manageable levels".*

The Principals of all the other colleges supported this view.

The third area of colleges' international work involved the recruitment of overseas students onto courses offered in the UK; this activity forms the core of this research.

The fourth area in which colleges were to varying degrees involved, was the delivery of education and training overseas. This was usually done either in partnership with an overseas college or training organisation, or through a wholly owned subsidiary of the college operating overseas. Usually colleges developed these overseas education and training contracts after a period of other successful ventures involving international work. This type of work was

seen by all of the colleges as by far the most risky type of international activity. The fourth type of link involving curriculum delivery overseas is the clearest evidence available of a college's investment in, and commitment to, international work. Not only does such work require a significant commitment from colleges, but creates a whole range of management issues relating to course delivery which need to be addressed. However, it is not the only indicator that a college has achieved a significant maturity in its development of international work. Only two of the four colleges visited had developed curriculum delivery overseas and in these colleges it did not form a significant part of their portfolio of international activities. The two colleges not engaging in curriculum delivery overseas had other well established international work and had made a long term commitment to developing this work. The Principal of College A explained:

> *"We have made a conscious decision not to deliver courses overseas; if we did we would merely be exporting our management problems overseas; you have only got to look at other colleges who have done too much of this type of work to see the problems they have faced."*

The evidence indicates that the first two broad categories of international work outlined above were not entered into with the aim of generating significant financial surpluses, but with the clear aim of providing an enhancement to the curriculum offering for home-based students, or to make the course more attractive to potential home-based applicants when they were considering at which college to study at. In many cases these links led to curriculum enhancements but cost the colleges money and were, in financial terms, a net cost rather than a net income earner to the college.

4.4.2 International work and the market

The development of the quasi-market in further education did not feature strongly in any of the colleges' responses as to whether it alone had led to an increase in their international work in general, or the recruitment of international students in particular. This may have resulted from the fact that the market for international student recruitment has always been, whilst not wholly satisfying the criteria set out by Bash and Coulby (1989), a largely free market. The impact of the quasi-market had only an indirect impact on the colleges' decision to recruit international students.

The Governor interviewed in College A was a Governor prior to incorporation and commented:

> *"We were recruiting overseas students long before incorporation. Even though the LEA notionally kept the money, we were able to count it towards our annual budget and it did make balancing the books easier. Since incorporation and with the pressure put on us by the FEFC, it was a good job we had started overseas recruitment early. In the days of the LEA, trying to get to the bottom of the College's budget was impossible – they really didn't care about the College. Now we know how the financial surpluses from our international student recruitment are used."*

This Governor's comments echo the comments of Farley (1987) who was concerned at the lack of resources and support given to further education colleges by the LEAs largely because of the local and parochial focus of

elected members' interests. The greater involvement of Governors in the strategic direction of further education colleges will have heightened their interest in all aspects of the college's work, a very different role from the one characterised by Charlton, Gent and Scammells (1971) and Tipton (1973) and the pre-incorporation Governors' passive involvement in the strategic direction of the college.

All four colleges indicated that their recruitment of international students had pre-dated incorporation. This finding supports the quantitative questionnaire data which indicated that the majority of respondents had been passively recruiting international students in excess of eight years, with a significant number having been actively marketing overseas for in excess of five years. In the four colleges, the growth in recruiting international students could be traced to the late 1970s and early 1980s, when colleges were looking to supplement their LEA income with income from other non-Governmental sources, income over which they would have had more direct control.

International recruitment gathered pace with the freedoms of incorporation, the convergence of colleges' Average Levels of Funding (ALFs) and the subsequent restriction on the growth in home-student numbers. The FEFC's funding methodology, which has moved all English colleges over a six-year period to a common level of funding per unit of activity, had led to the need for them to supplement their increasingly shrinking publicly funded budgets with other sources of income. Whilst the quasi-market led to increased competition between colleges for home-based students, three of the four

colleges commented that the impact of the FEFC's funding methodology introduced in 1994, and the convergence of Average Levels of Funding and restrictions on home-student growth, had been more significant drivers for them in increasing their international student recruitment than the quasi-market in further education.

The Principal of College B put it succinctly when he said:

> *"With the pressure on funding from the FEFC we were glad we began recruiting overseas students when we did. Overseas recruitment and other commercial activities have enabled us to diversify our sources of income significantly in advance of any FEFC pressure to do so".*

This led all of the colleges to re-evaluate and, in turn, re-prioritise their international recruitment and to see the recruitment of international students alongside the college's other efforts to generate income from all non-Governmental sources. The international student market is one of the few totally unfettered markets open to colleges and one not directly affected by local economic factors. Besides an individual college's internal logistical considerations, such as its ability to provide for increased numbers of international students, the only external restrictions on the numbers of international students that can be recruited, has been the ability of students to obtain study visas to spend time in the UK. Whilst home students have in effect since incorporation been given a voucher to study in any further education college of their choice in the UK, the restrictions on growth funding placed upon colleges since 1987 has meant that the numbers of student vouchers that can be encashed by each college annually has remained

largely static. Therefore the only areas of income which offer colleges the potential for significant increases are those where the funding effectively comes from sources other than the Government, such as full-cost courses for local industry and commerce, some EU funded programmes and international student recruitment. King (1976) used the term consumerism to describe colleges' ability to target their courses and services to their local community. The need to generate alternative sources of income has merely required colleges to re-define their local community to include a wide range of new, and often geographically distant, communities, and target their marketing efforts on those communities. The recruitment of international students is one of the few totally free markets in which English colleges operate and offers colleges significant opportunities for growth. The four colleges visited viewed the recruitment of international students as a virtually unregulated market.

The Principal of College C said:

> *"We have no restrictions placed upon the numbers of international students we recruit, how we recruit them and the courses we offer them. It is a market over which we have greater institutional control."*

The Principal of College A commented:

> *"We recruit such small numbers relatively from each overseas market that even a small increase from a single market has a big impact upon our income from such work."*

Accepting the requirement for potential students to obtain a UK study visa, the only formal regulation is by the British Council who promote only a voluntary

Code of Practice for colleges recruiting overseas to encourage ethical recruitment practices. Any contractual relationship is between the college and the individual student, with intermediaries such as agents only becoming involved if the college or student chooses to use them, and with the student's ability to pay the full-cost fees for the course being the only limiter to their coming to the UK.

If we use the criteria of a free market provided by Morrison (1994), we can see how relatively free from constraint the recruitment of international students is. There is competition between providers; any college can enter or leave the international student recruitment market at will. The consumer (the student or parent) is usually exceptionally well informed about the courses available to them. There is individualism both on the part of the student dealing individually with the college of their choice, and individualism amongst providers each attempting to present as differentiated a course portfolio as possible. There is a diversity of providers, both in the UK and in other overseas countries recruiting international students. The market is free from constraint. The English colleges recruiting overseas are "privatised" or incorporated and the Government is not a direct beneficiary from overseas student recruitment. Quality control is provided in the form of the FEFC's quadrennial inspection reports which are available to any students or parents requesting them. Finally, information is readily available, either from individual colleges or The British Council. However, the recruitment of international students does not take place in a totally free market, but as near

to a free market as is possible and certainly not like the one for home students.

A possible complexity is that competition in the international student recruitment market is not merely between similarly constituted and funded English colleges of further education. The Principal of College C identified his college's major competition as follows:

> *"Our major competitors are other English colleges of further education, some of whom are more professional than others; English private colleges and correspondence schools, who are often highly professional in their marketing but sometimes deliver a poor quality course to the student, and English Universities offering English as a Foreign Language (EFL) and Access courses, all of whom have muscled in on a market which is not really theirs. Why don't they concentrate on higher level work and let us concentrate on sub-degree level courses."*

Non-English competition was seen by the Principal of College C as coming from similar types of providers in other parts of the UK, Australia, Canada and the USA. Research by Greenaway (1995) indicates that the UK only attracts 17% of students worldwide enrolling overseas; the USA attracting the greatest number, 70% of all international enrolments. The Principal of College C said:

> *"Not all of the organisations recruiting international students are similarly constituted or funded and some receive far more active support from their Government, both financially and in terms of immigration and other rules governing the length of stay an overseas student can have in their country."*

Another factor in international student recruitment alluded to earlier, but which should not be ignored, is the volatility of international markets and particularly

international economies. The recession in the Far East which began in 1998 has caused at least two of the colleges visited to revise downwards their future projections for international student recruitment from Pacific Rim countries. Whilst international student recruitment can offer a buffer against adverse student recruitment trends in the UK, for the first time colleges have been significantly affected by the decline in enrolments from Far Eastern markets. Entering such a volatile and largely unregulated market as international student recruitment has disadvantages as well as advantages for colleges. The recession in the Far East may have provided a necessary challenge to colleges' perceptions of the Far East being a constantly growing market for students. The Principal of College A commented:

> *"We have examined very carefully the markets in which we operate; we don't want to put all our eggs in one basket and we need to plan more effectively for overseas student recruitment."*

4.4.3 Stages in a college's development of international work

No clear picture emerged from the interviews with the four colleges about the initial impetus for beginning international student recruitment other than as a generator of an alternative source of income. In all four colleges, overseas student recruitment had begun well before the *Education Reform Act* (1988) and the introduction of the quasi-market in the compulsory sector of education, therefore only anecdotal evidence was available about how the colleges' international recruitment activities had begun. In only two colleges was there any perception that international student recruitment had begun as a means of supporting curriculum areas where there was declining home-market demand. There was some evidence that some colleges had begun recruiting international students, specifically onto courses in engineering, to preserve course provision from closure for a declining number of home-market students. The International Manager of College A said:

> *"We began recruiting overseas students when The British Council began to want us to offer courses in water sanitation at Higher National level for students from developing countries. Our engineering department was going though a bad patch and work for The British Council seemed a good idea."*

In all four colleges one feature in the early years of international recruitment had been their response to unsolicited enquiries from potential students overseas wanting to study in the UK. At some stage prior to incorporation the four colleges had come to the conclusion that, rather than merely responding to these unsolicited enquiries, a more pro-active and managed approach was

necessary. In two colleges, contracts for the training of overseas students in branches of engineering were the first stage in their embarking on developing an international portfolio of work. The International Manager in College A explained:

> *"I was teaching in engineering when The British Council contracts came along. Pretty soon the College decided that, in addition to responding to unsolicited enquiries, there needed to be some planned development of overseas work."*

However, these British Council contracts were entered into at the same time as unsolicited applications were being received and overseas students were being recruited onto existing home-market courses in a piece-meal fashion. This perhaps distinguishes the two types of international student. The corporate or contract student, whose place on a course is "bought" by The British Council, an employer or sponsoring organisation, or some intermediary, and the individual student, who applies directly to a college on his/her own behalf, and who is probably paying his/her own course fees with parental support or savings.

There was no common picture evident in the four colleges of any similar process, or stages of a process, in the development of their international work. There appeared to be no set stages which had to be completed successfully before the next stage in the process was embarked upon. In at least one of the colleges (College A) the initial impetus to develop international student recruitment was not a decision made as part of some logical process of development but as a response to the chance to earn some

non-LEA income when it was readily available. The Marketing Manager in College B said:

> *"Overseas student recruitment began in two areas of the College neither of which was working logically with the other. Overseas students were being recruited onto main stream courses by a former engineering lecturer who had been given a brief to develop the work, and by the lecturers in EFL who were told to increase the number of full-time overseas students they recruited."*

Undertaking British Council contracts clearly gave the two colleges involved in that work valuable insights into the management and delivery of courses for students from overseas, which could then be transferred to other curriculum areas. The Principal of College A commented:

> *"The College had to learn how to bid for, plan and manage British Council contracts. This was a useful experience for the College and helped us to develop our international expertise. We began to learn about and prepare for the challenges of dealing with international students."*

These British Council contracts also provided the colleges with some insight into the potential levels of income that could be generated from international student recruitment. What British Council contracts would not have given the two colleges was insight into the direct marketing of courses and services to individual international students. Nor would British Council contracts have given the colleges any experience of the use of overseas agents; these agents are able to introduce to colleges a third type of international student, the individual on whose behalf the agent is acting along with other individual

students, in securing a place at a UK college. The International Manager in College A said:

> *"The British Council just sent us the students; we didn't have to go out and look for them. I know of a number of colleges who became too dependent on British Council contracts and when they dried up they were in real trouble. They thought the money would just keep coming but eventually it stopped."*

The four colleges would only have gained an understanding of the process of dealing with individual students by responding to the unsolicited enquiries they were receiving and then, subsequently, seeking to develop that area of work.

It is possible to advance a logical process for the development of international student recruitment in a college. However, much would depend upon a college's course portfolio and its previous experiences of generating income from non-Governmental sources and the willingness of the college to make a long-term commitment to international work.

A sensible first stage would be for a college to gain an understanding of international student recruitment either by delivering a contract for The British Council or another client, requiring the education and/or training of overseas nationals in the UK coupled with passively recruiting overseas students onto home-market courses. In the four sample colleges, two colleges had begun their overseas work by undertaking British Council contracts and two had begun by passively recruiting overseas students. Passive international recruitment implies merely responding to unsolicited enquiries received by a college, not actively targeting overseas markets or participating in exhibitions

overseas or other events directly in the market. When entering the international student recruitment market all four colleges began either with discrete groups of students fully funded by The British Council or by in-filling overseas students into existing groups of home-market students. This way fixed costs were kept to a minimum, or were fully guaranteed by the contract, and the real risks to the college's financial position minimised.

An alternative route adopted by two of the sample colleges and undertaken concurrently with passive student recruitment was by developing EFL courses for au-pairs. Au-pairs are usually resident in the UK for a relatively short time period and host families usually agree to provide the au-pair with some English language support. In response to this the two colleges developed part-time EFL courses. These were eventually expanded into one-, two- and three-term full-time courses targeted at overseas students leading to formal EFL qualifications and with the option of progression onto other courses of study. The Principal of College B said:

> *"In our local area there are lots of families with au-pairs who want to learn English. We just used that market to begin our development of EFL. It was relatively easy, didn't require us to make major financial commitments and formed the bedrock of our current EFL provision."*

These two colleges then used their experience of EFL courses as the basis for recruiting international students onto a wider range of academic and vocational courses. This process would enable a college new to the international student recruitment market to develop its expertise and infrastructure, to respond to relatively modest numbers of international

students initially before embarking on a more significant volume of enrolments later. When a college begins to set up discrete groups of international students they need to be supported by an infrastructure providing accommodation, welfare and English language support. This involves a college in far more significant fixed costs and greatly increases the risks to the college's budget from ultimately unsuccessful recruitment but with fixed costs already incurred.

Once colleges become more familiar with the international market and responding to the needs of overseas students, they could embark upon a second stage consisting of actively recruiting overseas. This involves a greater institutional commitment to overseas work, the establishment of overseas marketing budgets, an administrative infrastructure and the targeting of particular markets. This process is still entirely concerned with recruiting students to the UK and delivering courses in the UK, whilst at the same time maintaining a tight financial, administrative and managerial control over international work by containing it within the college's main UK base.

A possible third stage in a college's development of international work, only to be undertaken by the most committed of colleges, is the delivery of education and/or training overseas. Whilst, in the questionnaire survey 60% of respondent colleges had indicated that they did deliver education and training overseas, the visits revealed a more cautious approach, with colleges not wanting to "export" their management problems overseas. The Principal of College C commented:

"Whilst your survey may show a high percentage of colleges delivering courses overseas, my view is that many colleges will have done it once or twice but will not be doing such work on a regular basis."

This delivery of education and training overseas can be achieved either in partnership with a college or private training provider in the overseas country, or through a wholly owned overseas subsidiary of the college. However, the college needs to accept the challenging financial, administrative and managerial responsibilities such a development entails. This third stage, involving links with colleges and other *education/training providers overseas*, requires a maturity in both the management of the operation and in the understanding of a college's commitment and exposure to international work.

4.4.4 Marketing

The third question posed at the beginning of this research was what are the most successful techniques used by colleges in the recruitment of international students? As has been indicated earlier the level of sophistication in the data colleges hold on their international activities presents a severe limitation to any detailed analysis. Whilst broad generalisations can be made, without detailed information they can only remain just that.

Any judgement of successful techniques used by the four colleges in recruiting overseas students is based upon interviews and observations made during the interview process. What it was not possible to do was examine how each of the colleges had increased the sophistication of its international marketing during the years it has been recruiting overseas students. The analysis of the development of the marketing of further education in the literature review describes how the further education sector has increased its sophistication in marketing its courses and services to its potential customers since the mid-1980s, moving on from the production and selling concepts to the marketing concept. The seminal research by HR and H (FEU/HR and H 1985 and 1986) spurred by the work of the Audit Commission (1985) and followed by Davies' and Scribbins' book (1987) all led to increased sophistication in the marketing of further education both at home and abroad. The comments by Woollard (1985) referring to the MSC's concern about colleges' inability to market their courses to potential customers became increasingly less valid from the mid-1980s onwards. It is clear to see that the development of marketing as a management activity in further education has been a slow process and recent FEFC inspection reports are still highlighting colleges where marketing to home-based students is an issue that needs to be addressed. Anecdotal evidence would suggest that in those colleges recruiting international students pre-1988, marketing techniques had been developed for the international market which were well in advance of those applied by other colleges to the home market. The high costs and need for demonstrable results from international student recruitment led to direct benefits to colleges home marketing, by applying the lessons of the

international market to the home market. However, the impact of the ERA and the quasi-market, incorporation, and increased home-market competition between colleges means that much international marketing activity now lags behind what is happening in the home market. By and large colleges generally know far more about their home market and their local recruitment area than they did even five years ago; detailed market information is now used by many colleges to target, in a variety of sophisticated ways, their market. The evidence gained from the interviews indicates that, in a significant number of instances, colleges are still using fairly unsophisticated and un-targeted methods in their attempts to recruit international students. Whilst all of the colleges visited would see their marketing activities complying with Brassington and Pettit's (1997) definition of societal marketing, there have been examples of colleges adopting a more "hard-edged" approach to their international marketing compared with the service focussed, ethical home-market marketing.

In assessing four colleges' marketing efforts, it is useful to use the work by Belcher (1987) and Woodhall (1989) cited earlier. Belcher (1987) proposed eleven categories of response by higher education institutions to the need to increase numbers of international students. His categories were; earmarking funds for development; promotion and recruitment; formation of international committees; market research; promotional and recruitment visits abroad; joining various commercial organisations; putting pressure on The British Council; advertising widely abroad; developing more sophisticated information and promotional materials; establishing international links; establishing access

routes for international students; improving the service to international students; instituting scholarships; undertaking professional and ethical recruitment and developing an institutional policy on international recruitment.

Woodhall (1989) proposed five recruitment strategies used by higher education institutions which are now ripe for review; word of mouth, advertising, and the efforts of The British Council; development of overseas contacts; direct marketing; incremental targeting of particular groups, and changing courses to suit market needs.

It is then necessary to combine Belcher and Woodhall's lists under somewhat different headings; professional/ethical recruitment and institutional policy; course design; development funding; advertising and promotion; international committees; market research; joining commercial organisations; The British Council; establishing international links, improving service, and scholarships, and then analyse the four colleges' views under each heading.

4.4.5 Professional/ethical recruitment: Institutional policy

It was clear from the interviews that all of the four colleges undertook their recruitment of overseas students within an ethical framework largely centred around each college's Student Charter, which the FEFC requires every English college to have in order to be able to receive UK Government funds. As part of this ethical recruitment, all of the colleges had formally obtained

Governing Body approval for international student recruitment and reported at least annually to them on key aspects of their overseas work. The Governor from College A said:

> *"The Governing Body decided that one of us should take a particular interest in overseas student recruitment. It became my responsibility and I have travelled overseas with our International Manager. This has stood us in good stead now that the FEFC is requiring a greater reporting to the Governing Body of the College's international activities and the expenditure on them."*

Whilst the Principal in College C reported annually to his Governing Body on the international student recruitment, he did not involve Governors directly. He said:

> *"I don't think it's appropriate to involve Governors directly; just to account to them properly for the income we generate and the recruitment and other expenditure we set against that income."*

It was clear that all four colleges visited were engaged in what Brassington and Pettit (1997) describe as societal marketing, where marketing is handled responsibly and in a way that contributes to the well-being of society. All four colleges indicated that the quality of the students' learning experience was paramount and all of the colleges were keen that students returned to their home country with both a positive view of their college in particular and the UK in general. Whilst the income from overseas student fees was the initial motivation for this work, it was not a purely money-driven activity.

The Principal of College D articulated the views of the other three Principals when he offered the view that:

> *"We are not in the business of recruiting students at all costs. We want to give them a good experience in the UK and provide them with a quality course, which enables them either to return home with skills that are of use in their home country, or provides them with the necessary qualifications to undertake higher level studies in the UK."*

4.4.6 Course design

There was clear evidence in each of the four colleges that they had grasped the concept of marketing as proposed by Kotler et al (1996) and that courses had been devised to suit the needs of international students. All of the colleges were accepting applications from international students for all of their courses, where they felt a clear benefit accrued to the student from attending their chosen course. No limits were put on the types of courses international students could apply for, but clearly potential students would be guided away from courses that were totally unsuitable. Effectively, the whole of the college's full-time offering was available to international students, not just a small segment of the offering. The Principal of College D was clear:

> *"Our most popular courses for international students are a one-year Access course designed specifically for them and our EFL provision which, by the nature of its content, is targeted towards international students from countries where English is not one of the official languages."*

In the three colleges where courses had been specifically developed in response to requests from overseas (A, B and C), there was a clear indication that they were willing to tailor their provision to suit the needs of students, parents or corporate clients from a particular market. In College A, courses had been developed in engineering for The British Council and also for small groups enrolling as individuals, not as part of a larger contract. College A was the only college to indicate that they had used international recruitment to develop new curriculum areas which had not previously been offered to home-market students. The Principal of College A said:

> *"It became clear to me that we could develop courses in horticulture and garden design specifically for the Japanese market, for young to middle career females, but that these courses may have an appeal to local students."*

4.4.7 Development funding

The lack of detailed financial data in any of the colleges limited any comment on how the development of international work is funded. The Marketing Manager in College B said:

> *"There is very little financial information in the College on our overseas activities and we seriously need to address that situation next year."*

That view was echoed in the other three colleges. College A commented that they had used market research funding provided by the Department for Trade and Industry (DTI) under its Export Market Research Scheme (EMRS) to

develop overseas markets. The EMRS is not intended to be used by organisations to develop new markets, but merely to research the potential of a specific market. The Principal of College D commented that:

> *"We "pump-primed" our international work, but I can't be specific about how much was invested and in what ways."*

On-going development and marketing for international student recruitment in all of the colleges was funded by a percentage of the overseas student's fee being returned to a marketing and development budget, which was supplemented by a nominal sum from the college's annual budget allocation. Colleges A and B indicated that their International Unit received a small annual allocation from the college's main budget supplemented, in large part, by a per-capita sum for each international student recruited into the college. Even if a student made an unsolicited application with no input from the International Unit, the International Unit still received the per-capita allocation.

4.4.8 Advertising and promotion

Each of the four colleges was heavily involved in promotion; the provision of a variety of printed and other materials for potential students, parents, agents and other intermediaries, and recruitment; a relatively sophisticated process of handling a student's application from the initial contact to them arriving on the first day of their chosen course, perceiving these activities as being at the

core of their success in enrolling international students. The Principal of College C said:

> *"We produce lots of glossy brochures and publicity material but we don't really evaluate how successful any of it is."*

The result was that in all four colleges, they were less able to articulate which methods of promotion were most effective in the different markets they enrolled students from. Only one college (College A) commented on having different aims in each market and the different promotion and recruitment methods used in different markets. However, similar publicity was used in all overseas markets. The Principal (College A) said:

> *"We found our corporate image which we use in the home market was not suitable for the overseas market. We have decided to emphasise the Queen's English and English traditions. We now use the College's crest on all publicity and stress the scenic beauty of the part of England where our campus is. We are perhaps ahead of other colleges in this."*

With the exception of foreign language translation for particular markets, all of the colleges tended to see promotion as a world-wide activity rather than as a range of techniques being deployed in different ways in different markets. This may reflect the need for more work to be done by colleges in relation to Belcher's category (1987) "market research and focussing on particular groups".

Those promotional activities which were considered by the four colleges to be generally the most effective included the use of intermediaries, such as

agents; the underlying reputation of the college; the college's geographic location; personal contacts with former students and intermediaries in the overseas market; the use of technology, such as the Internet, and study abroad guides produced by the educational publishers in overseas markets. The Principal of College D said:

> *"There is no substitute for personal visits overseas using printed publicity and attending exhibitions as a backup to personal contacts."*

The Principal of College A commented:

> *"Personal contact following an exhibition or travelling overseas to meet agents and representatives is the most effective way of promoting the College. Building long-term links with agents and other representatives is critical; we have been developing our relationship with one agent for eight years now."*

The Marketing Manager of College C said:

> *"Our Internet site has been one of our most effective tools for promoting the College."*

It was evident from the interviews that each of the colleges produced a range of promotional materials, including prospectuses, overseas students' study guides, information about the college's locality and information on the successes of former overseas students at the college, all of which they mailed out in large numbers to overseas markets. Significant time had clearly been spent on the design and content of these items. College A had re-designed its overseas publicity to differentiate its overseas publicity and image from

home-market publicity and, in their view, to make their publicity more effective in the international market. Printed publicity clearly formed the most basic foundation of all the colleges' promotional activities but would not, in itself, generate many overseas student applications.

Perhaps the single most effective method of promotion which was rated as effective by all of the four colleges was that of personal contact. The Principal of College A said:

> *"I have built up a range of contacts overseas over a number of years and the investment in these has proved to be a wise one; there is really no substitute for making personal contacts and getting to know key people in the each of the College's key markets."*

Personal contact can include contacts with British Council offices overseas and the relevant staff dealing with overseas students; with educational agents; with former students; with current students in the UK and their parents abroad, and with key opinion formers, other British nationals and locals overseas who may be able to promote the college's offering in that country. The use of agents overseas and, in the case of College A, a part-time member of staff based in an agent's office overseas, provided the face-to-face presence in the overseas market and was probably, in the college's view, the most potent marketing tool it had. Agents' intimate knowledge of the market in the country in which they were based, their constant presence in the market and their ability to speak on behalf of the college in the market, made them a crucial link in the chain between the potential student and the college.

All of the colleges saw their reputation, which they each perceived as being of a high quality provider of relevant courses, as critical. However, apart from the quadrennial FEFC inspection report, no independent evidence is available to validate a college's claims about the quality of its provision. In addition, FEFC Inspection Reports may be fairly difficult to understand for non-English speakers. This is an issue which the AoC's International Group is currently addressing and is one where English colleges are at a disadvantage when compared with their US college competitors.

The Student Services Manager in College B said:

> *"Our greatest recruiting tool is word of mouth; if the College does not give students a good deal, word will get out and harm our future recruitment."*

This comment would be supported by the research of Woodhall (1989) which found that 50% of students she surveyed cited "personal recommendation" as their main source of information about a course in the UK.

All four colleges indicated that their geographic location was a key marketing tool, which conflicts with the earlier questionnaire research which showed no significant grouping of colleges recruiting overseas students in geographic areas perceived to be "attractive". All four colleges visited were located in towns where universities were also located, where the town was of either architectural or cultural interest, and in towns where there was a large student/young population.

The earlier quantitative survey indicated that geographic location was not a determinant of whether a college would engage in international student recruitment or be successful at it. Perhaps colleges are adept at making a positive out of a negative and are able to turn even the most unattractively perceived location to their advantage. Sadly, no detailed work has been undertaken on the geographic location of an education institution and its ability to successfully recruit either home or overseas students. Interestingly, the Principal of College C commented:

> *"Everybody knows the town where we are; it sells itself. It's full of overseas students at private language colleges and potential students want to study here because of our location."*

It would have been interesting to have talked to some other colleges who responded to the questionnaire survey, as they perceived their location to be an advantage, but were located in the North East or North West of England, often in large industrial cities with a limited number of international students studying there. It is clear that a close proximity to London, which is normally seen as a prerequisite for a college wishing to recruit international students, is not the only factor which is perceived as positive in terms of a college's location by both colleges and their students.

The impact of the Internet on international student recruitment is un-researched, but may provide an interesting area for future work. The rapid growth in Internet trading may be an indicator for colleges in how they should attempt to use technology to increase their recruitment in the future. All of the

colleges' Principals commented on their Internet site and how parts of it had been designed specifically to appeal to potential overseas students.

Study abroad guides also offer a relatively cheap method for targeting specific overseas markets. They do keep the names and activities of individual colleges in the minds of potential students, but like much of the colleges' overseas advertising, the value is untested and no detailed research had been undertaken by any of the institutions on the effectiveness of such methods of course promotion.

However, whereas each of the colleges rated their own Internet site as being a highly effective recruitment tool, the Overseas Development Manager from College D said:

> *"Don't subscribe to one of the publishing companies' Internet sites, such as Hobsons; we did and never saw any results from our investment. Purchasing advertising space in one of Hobson's printed guides may be a much better investment."*

Those promotional activities which the four colleges considered to be least effective included: appearing at overseas exhibitions; advertising overseas; becoming over-reliant upon overseas offices of The British Council to recruit students for the college, and joining consortia of colleges to promote a collective range of courses overseas, particularly where a college's home market competitors formed part of the consortia. Further discussion is required of these views.

The Principal of College A offered his view that:

> *"The British Council is an expensive waste of time; advertising overseas is also a waste of time and just attending exhibitions overseas and not meeting agents and others is also totally wasteful."*

The International Manager from College A said:

> *"As far as I am concerned, just having a stand at an exhibition is a waste of time; we went to the Gulf Education Exhibition last year along with a consortium of other colleges and employers and it wasn't worth it; don't ever join a consortium of other colleges who are your direct competitors."*

The comments by the four colleges on those promotional techniques which they rated as least effective also require some analysis. Whilst the four colleges rated overseas exhibitions as ineffective, all continued to participate in them. However, overseas exhibitions are only a small part of a promotional visit overseas and need to be combined with other activities. The most popular overseas education exhibitions attract upwards of 30,000 visitors who collect a wide range of printed literature from a wide variety of colleges. All of the colleges commented on the amounts and cost of the publicity material they took to exhibitions. Those colleges which were able to make a success of exhibitions overseas combined them with targeted advertising in advance of and during the exhibition; work with their overseas agent or intermediary before, during and after the exhibition, so that potential students are aware of the college's local contact in the market, and an attempt, using a variety of techniques, to differentiate themselves from other competitor colleges at an exhibition. The Principals of both Colleges A and C commented:

> *"It is no use just going to an exhibition overseas and hoping to recruit some students. The visit overseas needs to be seen alongside visits to agents, perhaps visiting some other cities in the country targeted, presentations to schools careers counsellors, head teachers and others, and direct contacts with The British Council and the UK Embassy in the country."*

All four colleges rating advertising as a less effective marketing tool, possibly resulting from them not having developed a co-ordinated strategy for their advertising. They did not appear to be monitoring enquiries resulting from any non-specific advertising and did not analyse any advertising timed to coincide with their appearance at an overseas exhibition. All of the colleges appeared to be advertising in study abroad guides published in the UK and overseas, but did not target their advertising to specific events overseas.

All four colleges made negative comments about the effectiveness of the British Council, its Education Counselling Service (ECS) and the cost of membership of that service. These comments will be addressed later. However, the questionnaire survey revealed that 43% of respondent colleges were members of ECS, with 61% of respondents rating it as good or better.

Colleges also commented on the limited use of joining consortia of competing colleges and exhibiting overseas as a consortia. Very few international marketing consortia involving groups of further education colleges have been successful. Far more profitable have been consortia of further and higher education providers, with the further education colleges providing the access routes into higher education degrees, usually within the context of an

Associate College Agreement, and the universities concentrating on promoting and recruiting to graduate and post-graduate courses.

It is perhaps necessary to distinguish between those activities which colleges engage in and which constitute positive promotion; advertising, attending exhibitions, etc, and those activities which are passive and cannot be influenced by any specific activity on behalf of the college, such as a college's location, its long-standing reputation, etc. Passive factors may be totally outside the control of a college; no amount of effort could, in the short term, improve a college's location, its reputation, etc, the only things it could directly influence are those which fall under the category of positive promotional factors.

4.4.9 International committees

Whilst each of the four colleges visited had an international working group consisting of those staff who participated in international marketing activities, the incorporation of colleges has led to the Governing Body and its sub-committees having the most significant impact on a college's international activities. Through the college's annual three-year strategic plan, Governors are able to provide the strategic direction to the college's activities and decide on priorities. The international committee or working group is merely concerned with the implementation of Governing Body policy, important though that is. However, a problem which each of the four colleges had

sought to address was how to gain staff involvement in and commitment to international student recruitment. More important, was the responsibility for international student recruitment; was it the responsibility of a small group of specialist staff or of a wider number of staff at all levels in the college? A variety of approaches were adopted with each college claiming that their method was most successful.

In Colleges A and D, a small team of staff travelled overseas, whilst in Colleges B and C, a wider variety of staff were involved in international student recruitment. The Principal in College A said:

> *"We have developed a small team of staff who travel overseas including a Governor; it's easier to manage the operation with a small, well-trained and tightly-knit team involved in visits overseas."*

However, in College C the Principal said:

> *"I rotate around a larger group the chance to travel overseas. In these days of concerns about probity and the ethical benefits of recruiting overseas students, it's good to keep a larger group of people 'on-board' for international activities."*

Using a smaller team of specialist staff ensured that each member of the group built up significant expertise and became wholly familiar with international student recruitment. Using a wider group of staff gained commitment to overseas student recruitment from a wider body of staff but dissipated expertise amongst a much wider group.

4.4.10 Market research

All of the four colleges relied almost entirely on the British Council's Education Counselling Service (ECS) for their systematic market research. ECS produces market surveys on each overseas country in which it maintains representation and, as part of the ECS membership fee, supplies colleges with these reports. Whilst all four colleges rated the reports as being useful, their impact can be limited, particularly as individual colleges are recruiting relatively small numbers of students from each individual country. While the ECS reports examine a country's potential as a market for British further education at a macro level, an individual college could, by developing successful links with one agent, develop a highly successful market at the micro level. There was no evidence from the four colleges that they had used specific market research to influence the decision to target a particular market. More often, they had received a direct approach either from individuals, an organisation wishing to send students to the UK, or from the British Council which had, in turn, triggered the college to begin investigating the country in question. The Principal of College D commented:

> *"We have never undertaken any systematic market research overseas; it would be too difficult to do and we could not afford the costs. The British Council provides the only market research freely available and we find that sufficient."*

4.4.11 Joining commercial organisations

There was no evidence from the interviews with the four colleges that any of them had used links with local commercial or industrial organisations directly to assist in international student recruitment. Neither was there any evidence that colleges had participated in Department of Trade and Industry (DTI) trade missions abroad as part of their international promotion programme. However, in Colleges A and C the senior manager responsible for international student recruitment was closely involved with either the local chamber of commerce or chamber of trade and so was aware of local initiatives to market the locality overseas.

The International Manager of College A said:

> *"I have been President of our local Chamber of Commerce and that has provided some useful contacts. We have, on occasion, been overseas with a group of local business people. However, we would not want to do it on a regular basis."*

The Marketing Manager in College C added:

> *"Whilst I have been Secretary of our local Chamber of Commerce I have not seen any direct benefits from this, other than having a wider view of links between the town and commercial organisations overseas."*

There is some evidence that those geographic areas of the UK, such as those counties, which market all of their services overseas, such as education, tourism, inward investment, industrial base and the like are able to create a

more positive image in an overseas market than those geographic areas where promotion of the area is more fragmented.

4.4.12 The British Council

Since 1988 the British Council has operated a subscription-driven organisation to promote British further education abroad, initially called the Education Promotion Service and, since 1992, the Education Counselling Service, a joint further education, higher education and private sector promotion service. All four colleges surveyed were members of the ECS and had been so for at least three years. There was amongst them a general dissatisfaction with the benefits they gained from their membership. As the Principal of College A firmly said:

> *"The British Council is an expensive waste of time."*

The Marketing Manager of College B was urging his Principal to re-evaluate the benefits of membership of the British Council ECS. He said:

> *"Why don't we cease to renew our ECS membership, attend only selected events overseas and, if necessary, pay a higher cost because of our non-membership of ECS and devote the money saved from our ECS subscription to other direct marketing activities overseas."*

However, all of the colleges were convinced that leaving the ECS and not renewing their subscription would be unwise and would give a negative

message about the college's commitment to international work to The British Council. In addition, two of the colleges commented positively on the support that British Council offices overseas can give to visiting college staff. However, these two colleges indicated that much depended on the quality of individual British Council staff and not necessarily on a policy by the ECS of supporting ECS member colleges travelling overseas, in a particular way. In addition, some British Council offices were seen as direct competitors of UK colleges, offering English Language Training themselves and being seen by British Council managers in London as a cost centre. The Principal of College A commented:

> *"The British Council are our competitors in some markets and will 'poach' EFL students for their own English Language Centres overseas rather than make potential students aware of what is available in EFL in the UK."*

Whilst all of the four colleges were members of the ECS, all four were also members of the United Kingdom Council for Overseas Student Affairs (UKCOSA), which provides advice to colleges on a wide range of international student matters but most specifically welfare issues. All four colleges rated UKCOSA highly. Three of the colleges (Colleges A, B and C) were members of the British Association of State Colleges in English Language Training (BASCELT), which they again rated highly as an organisation fostering good practice and providing a "kitemark" for the provision of approved EFL training. These views are supported by the quantitative questionnaire survey. Whilst this research was being undertaken, the British Council announced a review

of the future of the Education Counselling Service with the aim of providing a more effective service for members.

There were mixed feelings amongst the four colleges about increased involvement in international work by examination boards and other bodies, such as the Association of Colleges (AoC). Whilst Colleges A and C felt that there was a role for the AoC, the other two colleges felt that there was already sufficient support from The British Council, UKCOSA and BASCELT. There was also a perception that if too many organisations became involved in promoting British education abroad, it could become counter-productive. The Principal of College D said:

> *"The AoC can't do much for us, and anyway, the event specifically related to overseas student recruitment which they organised at their Annual conference last year was dreadful."*

The Principal of College A added:

> *"The main role which the AoC can perform is as a lobbyist with the Foreign Office, for increased funding support for overseas students, and with the Home Office on issues relating to overseas student study visas."*

4.4.13 Establishing international links

Only College A had formally begun establishing international links directly related to international student recruitment.

The Principal of College A said:

> *"Curriculum articulation, involving international student exchanges between colleges with the international links counting towards either the student's existing course or towards another additional qualification, is the way forward, in the long term, for international student recruitment."*

College A had formed links with a college in the USA and was in the process of establishing links with a college in South Africa. Whilst the other three colleges had international links, these were not intended to increase international student recruitment but provide staff and student cultural exchanges. There is an argument that forming international links does provide a tangible link in an overseas country and easier access to potential students.

4.4.14 Improving service

None of the four colleges was able or willing to share any systematically collected data on international students' perception of their experience in the college. It is now common practice for English further education colleges to survey their students at least twice in each academic year to gain a picture of the students' perceptions of their learning experience in the college. Clearly a different research instrument from that used with home-based students would have to be developed for a college's international students, but the information collected would enable the college to form a clearer picture of how their international students perceive the education and welfare package they

are receiving. Completing the questionnaire may present some cultural difficulties for overseas students but, with guidance from staff independent of their learning experience, they should be able to provide useful information which the college can use to respond to their needs. The Marketing Manager in College B stated specifically:

> *"There are no specific perception surveys of overseas students taken in this college. It's something we need to do in the future."*

In College A, the International Office had obtained the European quality standard ISO 9002 but this was the only example of an industrial "kite mark" or third party certification being used. In College C there was a concern about the college's physical resources and particularly the "grotty buildings and town-centre location".

4.4.15 Scholarships

In only two of the four colleges were scholarships available, and these were actively used as a marketing tool. In both cases agents or intermediaries overseas recommended potential students for scholarships, but these scholarships only covered the student's tuition fees. Anecdotal evidence indicates that where colleges do offer scholarships, these are usually made available by open competition, usually involving the potential students in writing an essay of some sort, and having the successful recipient(s) chosen by the college's local agent or intermediary. These scholarships are widely

publicised to encourage non-successful applicants to find, by whatever means, the funds to study in the UK. However, there was a view amongst all of the colleges surveyed that scholarships had little positive marketing effects. Scholarships were more a symbol that the college was trying to assist students in countries with low incomes where studying abroad was not the norm, and where parents were generally unable to fund their child's study in England. The bulk of the study scholarships awarded to overseas students are awarded by private colleges who are able to access trust funds and other sources of income to fund their scholarships.

Moving on from the combination of the lists proposed by Belcher and Woodhall (1987 and 1989), a range of other issues were raised with colleges in the interviews.

4.4.16 Preparation for international recruitment

A final part of the interviews with each college's staff was to seek out what advice they would give to other colleges about to embark on international student recruitment. A view expressed by all four colleges was that "the fewer players the better" and any attempts to increase the numbers of colleges recruiting overseas was not viewed by the colleges positively.

The Principal of College D said:

> *"We don't provide any help or assistance to other colleges embarking on international student recruitment. The market is too crowded already."*

Naturally enough, as experienced overseas recruiters, there was some concern amongst them about the quality and commitment of some colleges recently entering the market of recruiting overseas students. These concerns centred around the newcomers' commitment to international work in general; how committed they were to putting in place a sufficiently robust infrastructure to provide a high quality offering to students, and whether they may do the image of English further education abroad harm if they failed to live up to the quality standards of the colleges with a longer history of this work. The Principal of College A said:

> *"There are too many colleges who, needing to generate additional income, start recruiting overseas students but as soon as they see the level of investment needed and the commitment and disappointments that go along with it, they soon give up. Often they will have upset a lot of students and potential students in the process."*

The four colleges' advice to those colleges beginning international student recruitment included seeing such work as a long-term investment taking at least three years before any real benefits accrue to the college with realistic enrolment targets; involving staff at all levels of the college in the development of international recruitment, and putting in place a high quality and robust infrastructure to support overseas students' welfare, medical needs, accommodation, social and language support needs. The colleges also felt that any other college embarking on overseas recruitment should be clear about its reasons for beginning such an activity and be clear that they had a

high quality product to offer to overseas students. The need to target specific markets rather than adopt a generalised marketing approach was also seen as essential.

The International Manager of College A said:

> *"Set a realistic target for the first five years of recruitment, don't market poor products, get the infrastructure right first, target specific markets and be prepared to invest significant sums in the early years often with few tangible returns."*

The Principal of College A added:

> *"You must train staff throughout the Institution first to be able to welcome and respond to the needs of overseas students."*

The Principal of College D said:

> *"Get the infrastructure right first and be prepared to make a long-term commitment to the recruitment of overseas students."*

4.4.17 Business planning

In all four colleges a re-evaluation of international work had taken place post-incorporation, when Governors had been putting together the colleges' three year strategic plan. The Governor from College A said:

"We specifically recruited a Principal with experience of international work could help us to review the work, look at options and develop a proper business plan."

The Principal of College D said:

"We have now put our international work on a proper footing; we now have a formal business plan which was presented to Governors."

In College C the Principal and Marketing Manager added:

"Governors are only concerned about the overseas student income; how it is generated is up to the Principal and management team."

However, the Principal offered a further perspective:

"I report to Governors personally on my own involvement in international work particularly in view of recent concerns in the sector about probity related to international activities."

There was no clear evidence why international work was evaluated, but the increasing business focus of post-incorporation independent industrial governors had led, in all four colleges, to a greater focus on the "business" of the college's work. In three of the colleges, detailed international business plans with costings had been prepared for governors, in one college clearly supported by a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis and an indication of the levels of financial commitment required over the succeeding three years to deliver the plan.

When College A had undertaken an evaluation of its international work it had focussed firstly on the targeting of particular overseas countries as markets and secondly on the management of the recruitment of overseas students specifically, and international work in general. Of particular interest in all four colleges was the limited sophistication of the business planning models used for assessing the costs and benefits of international student recruitment. Very little information was readily available on issues such as the costs of international student recruitment, the size and make-up of the international marketing budget, the numbers of students enrolled and the income generated from each market which the college had targeted and the direct and indirect staffing costs associated with international student recruitment.

Whilst the level of sophistication colleges are now bringing to their financial reporting is increasing year on year, three of the colleges admitted that they needed to improve both their collection of enrolment data on international students and the detail of the financial planning brought to their international work. In one college, there was significant uncertainty about the numbers of international students they had actually enrolled in the current academic year. This indicated a range of issues concerning colleges' ability to accurately return data on their student enrolments, but which extend beyond merely international student recruitment. The problems outlined may result from the relatively self-contained nature of international work and the supposed surpluses it generates for an individual college's budget. The further education sector has had to respond to ever-increasing requirements for data collection from the FEFC and international recruitment, in which the FEFC

takes no particular interest, may have had insufficient time devoted to it by college finance staff.

The Marketing Manager in College B said:

> *"We need to develop our business planning far more generally and specifically in relation to international student recruitment."*

Business planning in the further education sector can be traced to the White Paper *Training for Jobs* (HMSO 1984) and the requirement that colleges produce plans for their non-advanced further education courses. Whilst the NAFE plans and subsequent ERA and post-incorporation plans concentrated on what was perceived as a college's core business, there still is no requirement for colleges to produce a business plan encompassing all of its work, both core market and non-core market, which would probably include international student recruitment.

In one of the four colleges visited significant financial difficulties were being experienced. The college had decided to maintain its overseas student recruitment but not increase it until the college's general financial position was more secure. Discussing this college's strategy with the other three colleges it became clear that none of the colleges saw the income generated from international student recruitment as an easy solution to any potential financial problems they may encounter. The Principal of College B said:

"International student recruitment is a useful additional stream of income for the college, but can never be perceived as a quick solution to the College's more deep-seated financial problems."

This view may reflect the relatively long lead-time to develop international work, the significant time it takes to change a college's emphasis in its international work, and the relative volatility of international student recruitment.

4.4.18 Management of international work

No single model emerged for the management of international work in general, or overseas student recruitment in particular, in either of the four colleges. Comparing the management of EFL as a part of international student recruitment with the management of international work in its widest sense, international work has a higher management profile than that portrayed in the study by FEDA (1999). That suggests a relatively low managerial profile for purely EFL work, but in each of the four colleges, international student recruitment, onto both EFL and mainstream courses, was managed by someone reporting on a regular basis to the college Principal. However, there was evidence that international activities were relatively well integrated into the rest of the college's work. The management of international work needs to be considered as three distinct areas of activity.

The first activity could be described as the marketing function and is the recruitment of international students; where that responsibility lies and who is

held accountable for the achievement of international recruitment targets. The second activity concerns the general administration and management of international student support in terms of pre-enrolment advice and guidance, English language support, accommodation, welfare, and the supporting cultural programmes colleges often provide for their international students. The third activity concerns the delivery of courses and programmes to international students; in which academic department or division are international students located during their period of study.

In terms of the marketing of the college to international students, in College A its International Office dealt with all of the international marketing and the eventual recruitment of students, supported by the college's Marketing Unit when advertising and print materials were required to be produced. The Principal of College A said:

> *"The International Unit sits separate from the College's other marketing activities; it has its own budget and targets. It can call for assistance from the College's central marketing department but is responsible for all aspects of overseas student recruitment."*

In Colleges B and C responsibility for international student recruitment was located within the college's Marketing Unit and was seen merely as one of a number of markets which the college targeted. The Principal and Marketing Manager of College B said:

> *"All aspects of the recruitment of international students is integrated with the rest of the College's activities; only the EFL course delivery is managed separately."*

However, he also said:

> *"Some of our international activities still get through the net and are not co-ordinated centrally."*

Whereas in College C the Marketing Manager added:

> *"I am trying to manage all aspects of marketing and the international work is getting forgotten. In addition, our enterprise activities, generating work from local businesses, also has international links but they are not integrated with the international student recruitment I am undertaking."*

In College D international student recruitment was located within the college's Business Unit which was responsible for generating all non-FEFC income for the college. The Principal of College D said:

> *"We see international student recruitment as just one of many activities generating income other than from the FEFC. Therefore we have located it within the Business Unit."*

The provision of support for international students was, in the four colleges, delivered using two main models. In College A the International Unit was responsible for providing a complete service to international students, totally separate from any support provided to home students in similar areas. The other three colleges adopted a totally integrated approach, seeing overseas students' needs for accommodation, welfare and English language support as being no different from the needs of home students. However, in College B the EFL unit which not only supported mainstream international students but

also offered discrete EFL courses, felt marginalised from the college's main marketing and recruitment activities and felt that their "uniqueness" as a semi free-standing unit within the college was being eroded. In terms of their budget, the EFL Manager (College B) commented:

> *"It appears that our budget has disappeared off the map; how do we fund our future developments?"*

The EFL Manager in College B said:

> *"I think they want to close us down; ideally they want to fully integrate us into the mainstream of the College. That will damage our image as a small and unique service within the College."*

In the final area of course and programme delivery, in all four colleges where international students were enrolled on academic and vocational programmes intended primarily for home-market students, they became the responsibility of the academic department in which they were studying. If they were enrolled on a discrete programme for international students, such as EFL, in College A they became the responsibility of the International Unit, in College B the responsibility of a separate EFL department and in Colleges D and D they became the responsibility of the academic department in which the course was located.

4.4.19 Monitoring of international work

Recent reports by the National Audit Office and the Further Education Funding Council (1999) have focussed on the more sensational aspects of some colleges' activities in international markets. In one case in particular at Halton College, the report focussed on the perceived lavish expenditure by the Principal and his Deputy on visits overseas to develop international work. The FEFC has followed up these reports by issuing much stricter guidance to college Governing Bodies on expenditure by staff travelling, including what are considered to be reasonable levels of expenditure and the procedures that should be adopted for approving visits overseas and reporting back on expenditure compared to income generated. The visits to the four colleges sought to gauge the level of involvement by their governors in monitoring international recruitment activities.

Only in College A had governors become actively involved in the international work of the college, a small group being trained to accompany staff on overseas recruitment activities and taking an active interest in the recruitment of international students. However, a concern of both the Principal and senior managers was that there was:

> *"a danger of Governors doing private business overseas".*

The Governor in College A said:

"We have to be careful that there is no professional conflict between a Governor's professional activities outside the College and his responsibilities as a Governor of the College."

In the other three colleges, governors required an annual report to be presented to its committee dealing with financial issues which report on the recruitment targets set and how successfully they were achieved. In all three colleges, management set targets which were approved by governors; there were no instances of governors unilaterally imposing enrolment targets or trying to manage international activities directly. One concern in College C was that governors only became really interested in international student recruitment when there was perceived to be a decline in overseas student numbers and, in turn, income to the college. The Principal of College C said:

"I set the targets and report on their monitoring to Governors; they don't set me targets and monitor them."

As College C's Marketing Manager put it:

"Once you have a £0.5 million income stream you have to keep it coming".

Overseas marketing expenditure was allocated annually as part of the college's budget-setting process with approval for specific items of expenditure being given by the college Principal. There was no evidence in any of the colleges of any cost-benefit analysis being undertaken relating to marketing expenditure compared with targets achieved, or whether any more detailed analysis was undertaken market by market to compare expenditure with eventual enrolments.

5 CONCLUSIONS

One of the purposes of this piece of research is to inform professional practice and provide guidance and support for college Principals and Governing Bodies. It can assist them in two ways. For those colleges who are considering embarking on the recruitment of overseas students, it can provide useful guidance and highlight issues that need to be addressed. For those colleges already recruiting overseas students, it can act as an aid to what should be a regular evaluation of their recruitment activities.

The research is particularly apposite owing to two recent events. Firstly, the Government is now offering positive encouragement to colleges of further education to recruit more overseas students; doubling the numbers recruited within five years (Crequer 1999). The announcement by the Prime Minister, widely reported in the press, will encourage those college governors and management teams who have not previously considered overseas student recruitment to do so. Although the Government is not offering colleges any direct support towards their overseas recruitment activities, to support the initiative the Government has launched a "brand" for British education (Crequer 1999) which has, as its aim, the promotion of a corporate identity for British education. Secondly, two reports on Glasgow Caledonian University (National Audit Office 1998) and Halton College (National Audit Office 1999a) have highlighted the problems of colleges who have embarked upon overseas student recruitment without adopting appropriate operating procedures. This has resulted in adverse national publicity and concerns being expressed

about whether these colleges' activities were appropriate for publicly funded bodies and whether public funds had been used appropriately (McGavin 1998). The two National Audit Office reports highlight the fact that the recruitment of overseas students is one of the few unregulated markets in which colleges can operate; effectively a free market which is unconstrained by the quasi-market constraints which apply to home-based student recruitment. Currently the Association of Colleges (AoC) is developing a guide to good practice for colleges recruiting overseas students and the results of this research will be fed into the AoC's guide of good practice. The guide to good practice will be vital in supporting the increased number of colleges who are beginning to recruit overseas students, both as a means of supplementing the income they receive from the State and as an aid to diversifying their sources of income.

A major shortcoming in the past has been the limited volume of research undertaken on the activities of colleges of further education in overseas markets. Significant research, albeit now somewhat dated, has been undertaken on the recruitment of overseas students into institutions of higher education. However, little interest was ever shown in the further education sector's contribution to overseas student recruitment, apart from early research by the Further Education Staff College (Ecclesfield 1987). The bulk of the research referred to in the higher education sector focussed on a range of ethical and policy issues and issues relating to student welfare (page 67) with little or no interest being paid to the recruitment phase of an overseas student's period of study. The significant differences between the further

education and higher education sectors need to be borne in mind, not only when analysing previous research, but also when Government and other agencies are planning the delivery of services for the future, the brand for British education being a prime example.

In seeking to answer the first of this research project's three questions concerning the numbers of overseas students enrolled in English colleges of further education, the results clearly indicate that significant numbers of overseas students from a wide variety of countries are enrolling on courses in English colleges of further education. Data obtained from The British Council as part of the literature review (page 63) indicates gross full-time student enrolments in 1996/7 of 47,122 students. The more detailed data obtained as part of the questionnaire survey sent to all English colleges of further education not only supports those figures but provides more detailed information on the courses on which those students are enrolled and the countries from which those students come (pages 127/135). The courses on which the greatest numbers of overseas students were enrolled were short English as a Foreign Language (EFL) courses, short vocational courses, Higher National Diploma courses and A levels. The most popular curriculum areas amongst enrolling overseas students were English as a Foreign Language courses, engineering, the sciences and business studies courses. The countries from which the greatest numbers of overseas students were enrolled were Japan, Hong Kong, India and South Korea. Those countries most often targeted by colleges for recruitment related activities were Hong Kong, Japan, China and the Gulf States.

The second research question sought to gain an indication of why colleges recruited overseas students and what had been the initial motivation of particular colleges in developing recruitment from overseas markets. The difficulty in gaining accurate responses from colleges to this question was exacerbated by the significant numbers of changes in senior staff which have taken place since the incorporation of colleges in 1993. Often no one who was involved in the initial decision of a college to recruit overseas students has remained in post since incorporation and many of the decisions made by colleges in the past are obscured by both limited records of meetings and decisions being available and the passage of time (page 145). The reason most often cited by colleges for beginning to recruit overseas students (page 125) was the need to generate additional, non-Governmental income for the college. Seeking to develop an international dimension to a college's work or other, more altruistic educational reasons, did not figure significantly in colleges' responses to the reasons for embarking upon overseas student recruitment (page 125). Whilst there was an indication that there had been an increase in the recruiting of overseas students since the incorporation of colleges in 1993, evidence did suggest that overseas recruitment in a significant number of colleges had pre-dated incorporation (page 123). The most commonly stated time period during which colleges had been actively recruiting overseas students was between one and four years, followed by a period of between five and eight years (page 123).

The literature review clearly indicated that colleges of further education have been adept at responding to changes in Government policy over the years and have been skilful in targeting and developing new markets when required to do so, either as a result of Government policy or because of expediency. During the four broad periods of the development of further education since 1944, colleges have had to be adept at managing changes in demand and have had to become able to respond to these pressures. Whilst the incorporation of colleges created a formal, national quasi-market for further education, the concept of marketing with colleges actively promoting their courses and services to potential clients is not new. Colleges have been used to promoting their activities to a wide variety of client groups, to develop new markets but also to compete with both other colleges and private training providers. Initiatives during the 1980s to encourage colleges to more effectively market their courses and services established societal marketing as the model adopted by most colleges. It moved those colleges who had not by then embraced the marketing concept towards marketing and away from the production and later the selling concepts, leading them to focus far more effectively on the needs of their clients than their own needs as providers of a service (page 55). However, prior to incorporation, colleges did operate in a type of quasi-market, but one where there was no direct relationship between an increase in their student enrolments and an increase in their income. Incorporation and the development of the quasi-market in further education formally created a national market for students and gave colleges a financial incentive to recruit more students. The quasi-market and colleges' greater ability to market their courses and services also encouraged them to develop

alternative, non-Governmental sources of income. The coupling of the chance for colleges to retain any additional income they generated in any financial year, along with the convergence of funding levels per unit of activity between colleges, provided this significant incentive for them to develop new markets. More recently the decline in funding from the Further Education Funding Council (FEFC) for growth in the numbers of students a college recruited from the home market, coupled with national Government initiatives to reduce colleges' dependency on State support has further encouraged them to recruit overseas students. However, it was clear from the qualitative phase of this research that none of the colleges who were visited as part of the qualitative phase of the research saw the recruitment of overseas students, and the income they bring to the college, as being a universal cure for a college's financial difficulties (page 195). Overseas student recruitment should be seen as merely one source of income contributing to the diversification of a college's income base not as a simple solution to more deep-seated financial difficulties.

The findings of this research indicate that general colleges of further education and tertiary colleges have been the most active in recruiting overseas students, with sixth-form colleges barely developing this market (page 120). This is surprising considering the high esteem in which sixth-form colleges are held and the strong demand for A level courses, an area of expertise of sixth-form colleges, which is demonstrated by the overseas student enrolment figures. The most active overseas student recruiters have been medium sized colleges, being those with an operating budget of

between £5 and £15 million (page 113). Beyond the recruitment of overseas students, the majority of the colleges responding to the questionnaire indicated that they were involved in a wide range of international activities ranging from student cultural exchanges to bidding for EU funding from various agencies to support a wide range of overseas activities.

The third research question sought to identify a portfolio of techniques that colleges have found most successful in recruiting overseas students and, by implication, to develop a list of those methods deemed by colleges to be less successful as methods of overseas student recruitment. In the chapter describing the research methodology (page 106) the complex process through which a potential overseas student goes before enrolling on a course in England was discussed at some length. However, even accepting these complexities, it is possible to advance a list of more successful and less successful techniques for the recruitment of overseas students. Further, the recruitment techniques which one college cited as being successful were often cited by another college as being unsuccessful. For example, some colleges considered that advertising overseas in study abroad guides was of very limited benefit; other colleges considered this to be a useful promotional technique. The conclusion must be that the success or otherwise of individual advertising and promotion techniques were very much an institutionally based experience (page 181) with sector-wide generalisations being unhelpful.

The advertising and promotion techniques cited by colleges as being the most successful (page 173) were: the use of overseas agents; the reputation of the

college overseas; the college's geographic location; personal contacts with agents and others in the overseas market; advertising widely in study abroad guides available in the overseas market, and the use of technology, such as the Internet. A significant number of colleges cited personal contacts as the most effective method above all others for generating overseas student enrolments (page 175). Those marketing techniques cited by colleges as being less successful included: (page 178) participating in overseas exhibitions without any other activities comprising part of the overseas visit; advertising overseas other than in study abroad guides; merely joining The British Council's Education Counselling Service and hoping that membership of the ECS would be sufficient to generate student enrolments, and joining consortia of colleges where other members of the consortium were offering similar and competing courses. A major difficulty in analysing the effectiveness of different marketing techniques was the very limited regular evaluation undertaken by colleges of their overseas marketing activities. Only one of the colleges visited as part of the qualitative phase of the research had undertaken any evaluation of its marketing activities, and then in only a rudimentary form. When colleges were asked which organisations were the most help to them in their overseas student recruitment activities, the British Association of Schools and Colleges in English Language Training (BASCELT) and the United Kingdom Council for Overseas Student Affairs (UKCOSA) were cited as the two providing the most significant value for the subscription fee they charged. In its present form, the Education Counselling Service did not score well. It must be noted that, in separate interviews with the British Council, the organisation was clear that it needed to improve its

Education Counselling Service in order to retain existing subscribers and to gain fresh subscriptions from colleges new to overseas student recruitment (page 187).

An unanticipated outcome of the research was the wide variety of different stages through which colleges had gone towards developing their current profile of overseas student recruitment. Whilst it was hoped that it may be possible to advance a model of best practice for those colleges considering recruiting overseas students for the first time, no single best approach to developing overseas student recruitment was found. It is possible to advance a staged process through which colleges could go to develop an overseas student recruitment profile. This could begin with a college gaining experience in dealing with overseas students by either bidding for British Council contracts or passively recruiting overseas students, and then following these activities, if they have proved successful, with actively recruiting overseas students and marketing the college's courses and services overseas (page 160). However, this model has only been followed in practice by a small number of colleges.

A further unanticipated outcome of the research was the clear indication that there was very limited business planning undertaken by colleges recruiting overseas students, which resulted in only rudimentary overseas business plans being available in those colleges visited (page 194). Whilst the FEFC has required colleges to produce detailed strategic plans for their home market activities, business planning for non-Government funded activities in

general and for overseas student recruitment in particular, has been limited and not a statutory requirement. The Government's recent commitment to increasing the numbers of overseas students recruited by UK colleges, coupled with the need to respond to the recommendations of the report on Halton College (FEFC 1999d), has increased the significance for colleges to produce detailed overseas business plans. This research clearly indicates that the development of a business planning model for the recruitment of overseas students is a priority. This needs to be backed up by detailed guidance for colleges on the issues to be considered either when beginning to recruit overseas students, or when evaluating the effectiveness of existing overseas student recruitment activities. The model for business planning needs to be coupled with a range of evaluation tools to assess the effectiveness of the wide range of marketing and promotional techniques used by colleges to recruit overseas students. Business planning and evaluation tools are two issues which are of particular importance as the Government's initiative to recruit more overseas students is debated by college Governing Bodies throughout the country. It is clear from the activities at Bilston and Halton Colleges that overseas recruitment activities which are not properly planned and monitored can ultimately lead to the closure of a college due to debts being incurred which cannot be serviced (Bilston) or to significant redundancies and a need to refocus the college's mission towards a college's core market in order for it to survive in the longer term (Halton). The FEFC clearly needs to set colleges the task of producing detailed business plans for all of their activities which are not funded by the FEFC or other Government

agencies but which can clearly impact in a detrimental fashion on a college's budget if they are unsuccessful.

Further, there appeared to be very limited monitoring by college Governing Bodies of overseas student recruitment (page 193), except in one of the colleges visited where a conspicuous effort had been made to engage Governors in the college's international work. The engagement of a college's Governing Body in its international work is crucial. It not only ensures proper monitoring and evaluation it also guarantees active support and encouragement for those staff engaged in such activities.

A final unexpected outcome of the research was that no favoured model for the management of overseas student recruitment emerged, nor did any favoured model emerge for the management of overseas student activities within colleges (page 196). Whilst some colleges maintained a discrete Overseas Students' Centre, others integrated overseas students into the college's other, home student activities.

The results of this research were limited by the significant number of colleges who did not respond to the quantitative questionnaire, even though it was supported by the Association of Colleges. Considering the significant focus currently on overseas student recruitment is it surprising that the response rate to the questionnaire was not better. In many cases the questionnaire was merely not returned and in others not well completed. In other colleges it had clearly been passed to a more junior member of staff to complete even

though, to get really meaningful responses to some questions, it was necessary for the Principal to complete it. The significant changes in staff in the period since the incorporation of colleges in 1993 has meant that much of the opportunity to access background data has been lost. Pre-incorporation minutes of Governing Body and other college committees were not often particularly robust, which has resulted in staff new to colleges being unable to access detailed records, in order to comment on colleges' reasons for recruiting overseas students. In addition, detailed financial data on the impact of recruiting overseas students is missing from the majority of colleges, largely explained by the lack of rigorous business planning for overseas student recruitment activities.

Whilst College Principals provided the bulk of the information for this research, either by completing the questionnaire for their college themselves or by participating in a semi-structured interview, their views were triangulated, wherever possible, with other staff in their college. This indicated that in each of the four colleges there was a uniformity of view, amongst the majority of the staff interviewed, about the issues surrounding overseas student recruitment. When the four colleges were selected the views of each college's Principal on overseas student recruitment were not known. Documentary evidence which was examined as part of the interview phase of this research confirmed the largely uniform views of staff in each of the colleges.

recruitment has, until the new Government initiative, been a fairly low priority. Limitations of time and funding also impacted upon the research, reducing the number of visits that could be made to colleges and the amount of time that could be spent with each college. Any further research in this area needs to be adequately funded and seen as part of an on-going process designed to promote good practice.

Potential for significant further research in the area of overseas student recruitment is clearly needed. The mailing of an annual questionnaire on overseas student recruitment to all AoC member colleges would enable trends to be detected and the response of the sector to Government initiatives charted. Such a questionnaire could also provide a useful annual update for any guide of good practice produced by the AoC. A guide to good practice with regular updates on key issues is critical in assisting colleges to develop their overseas student recruitment policies in a robust manner, observing the two pressures of a need to develop non-Governmental income in an entrepreneurial way, coupled with the need to observe probity within the context of the Major Government's initiatives on probity in the public sector. Any guide to good practice would need to include as a minimum: detailed help in how to produce a business plan for overseas student recruitment, a model for colleges to use to evaluate their overseas student recruitment activities, guidance on models of good practice for the management of overseas student recruitment and course delivery, data on the most successful techniques used by colleges in marketing their courses overseas, and guidance for college governors on how to effectively monitor their college's overseas student

by colleges in marketing their courses overseas, and guidance for college governors on how to effectively monitor their college's overseas student recruitment. This research will contribute to the AoC's Guide of Good Practice, and work is currently underway to produce the Guide. A wider group of colleges than the four visited as part of this research is assisting the AoC's International Group in producing the Guide, which will have a wider brief than only the recruitment of international students to the UK. This will ensure that the Guide has the widest possible relevance to colleges in the further education sector and will be applicable to the bulk of even the most experienced colleges' international activities. Further research needs to be undertaken to determine how best to assist governors and managers in becoming more familiar with the issues surrounding overseas student recruitment and how to enable them to locate those activities within their colleges' wider curriculum portfolio. Finally, more research needs to be undertaken on the use of computer-based recruitment techniques and their effectiveness. The growth in Internet use offers even the smaller sixth-form college the chance to recruit overseas students at a relatively small cost. More research needs to be undertaken in the effectiveness of recruitment techniques in general and the use of new Internet-based recruitment techniques in particular and how colleges can most effectively use newly emerging technologies for overseas student recruitment.

With the support of the Association of Colleges, in the form of a guide of good practice, The British Council, with a more further education-focussed Education Counselling Service, and the active support of Government

agencies, the targets set by Government for growth in overseas student enrolments can be achieved. The balance between entrepreneurialism and probity can be managed provided colleges develop sufficient expertise and are supported by a range of sector-wide bodies whose value to the recruitment process is demonstrable. The recruitment of overseas students into English colleges of further education offers significant potential for further growth without the quasi-market restrictions of home market recruitment. The Learning and Skills Council must encourage and support colleges in developing their overseas student recruitment to achieve the Government's targets.

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APPENDIX 7.1 QUESTIONNAIRE SURVEY

ASSOCIATION OF COLLEGES

NATIONAL SURVEY OF OVERSEAS STUDENT RECRUITMENT
(excluding EU member state countries)

NAME OF COLLEGE .....

TYPE OF COLLEGE

Agriculture or Horticulture	.....
Art, Design or Performing Arts	.....
General FE	.....
Tertiary	.....
Sixth Form (former LEA maintained)	.....
Sixth Form (former Voluntary Aided)	.....
Sixth Form (former Voluntary Controlled)	.....
Specialist Designated	.....

COLLEGE SIZE (based on 1996/97 gross expenditure)

SMALL (less than £5 million) .....

MEDIUM (£5 million - £15 million) .....

LARGE (greater than £15 million) .....

FEFC REGION .....

GOVERNMENT OFFICE REGION .....

NAME OF RESPONDENT .....

Signed .....

Job Title .....

Date .....

NOTE: The individual responses from colleges will be treated as confidential. The national analysis will be published in a form which does not identify individual institutions and a copy of the findings will be forwarded to you.

1 Does your college presently actively market its courses and services overseas (not EU countries). Please tick:

	Yes	1.1

	No	1.2

If your answer is no, please proceed to Question No 9

2 (a) If yes, for how many years has your college been involved in passive recruitment and/or active marketing:
Please tick box:

		Recruitment		Marketing			Recruitment		Marketing
1 -4 years	2.1		2.8		17 - 20 years	2.5		2.12	
5 - 8 years	2.2		2.9		21 - 24 years	2.6		2.13	
9 - 12 years	2.3		2.10		More than 24 years	2.7		2.14	
13 - 16 years	2.4		2.11						

(b) What was your college's motivation for beginning to recruit non-EU students. Please indicate:

Yes		
	2.15	Diversify the college's income base
	2.16	Add an international cultural dimension to the college's work
	2.17	Preserve existing courses with a declining home market demand
	2.18	Promote a unique curriculum area internationally
	2.19	Other (s) (please state)

3 How many overseas students, in full-time equivalents, did your college enrol in the financial year 1996/7 in the following categories:

Please indicate by course type:

GCSE	3.1		BA/BSc Degrees	3.8	
A level	3.2		Overseas Access to Higher Education	3.9	
GNVQ Intermediate	3.3		Discrete long courses for overseas Students	3.10	
GNVQ Advanced	3.4		Short courses (EFL)	3.11	
NVQs	3.5		Short courses (Vocational)	3.12	
BTEC National Diplomas	3.6		Other (please specify)	3.13	
BTEC Higher National Diplomas	3.7		Other (please specify)	3.14	

Please indicate numbers of FTE non-EU students enrolled by FEFC programme area:

Sciences (including mathematics and computing)	3.13		Health & Community Care (including hairdressing)	3.19	
Agriculture	3.14		Art & Design (including performing arts)	3.20	
Construction	3.15		Humanities (including education and social studies)	3.21	
Engineering (including manufacturing technologies)	3.16		EFL	3.22	
Business (including administration and management)	3.17		Other (please specify)	3.23	
Hotel & Catering (including Leisure & Tourism)	3.18		Other (please specify)	3.24	

4 (a) What percentage of your college's gross income (1996/7 accounts) was derived from the recruitment of non-EU students?

4.1	%

(b) What percentage of your college's total marketing budget (1996/7 accounts) was devoted to the marketing of UK based courses to potential students from non-EU countries?

4.2	%

5 Is your college a member of any of the following organisations. Please indicate by ticking the appropriate box and indicate the level of benefit you feel that your college gets from its membership:

BASCELT (British Association of Colleges in English Language Training)

5.1	

Very good	Good	Average	Poor
5.11	5.12	5.13	5.14

ECS (Education Counselling Service)

5.2	

Very good	Good	Average	Poor
5.21	5.22	5.23	5.24

UKCOSA (United Kingdom Council for Overseas Student Affairs

5.3	

Very good	Good	Average	Poor
5.31	5.32	5.33	5.34

IVETA (International Vocational Education and Training Association)

5.4	

Very good	Good	Average	Poor
5.41	5.42	5.43	5.44

6 In which overseas markets is your college:

(a) investing in active student recruitment (not EU European) and

(b) how many students did you enrol in the academic year 1996/7 from each country:

Country		Active recruitment (a) *(Please tick)*	No. (b)		Country		Active recruitment (a) *(Please tick)*	No. (b)	
Brazil	6.1			6.23	Nigeria	6.12			6.34
China	6.2			6.24	Oman	6.13			6.35
Ghana	6.3			6.25	Qatar	6.14			6.36
Gulf States	6.4			6.26	South Africa	6.15			6.37
Hong Kong	6.5			6.27	South Korea	6.16			6.38
India	6.6			6.28	Syria	6.17			6.39
Indonesia	6.7			6.29	USA	6.18			6.40
Japan	6.8			6.30	Other (please specify)	6.19			6.41
Kenya	6.9			6.31	Other (please specify)	6.20			6.42
Malaysia	6.10			6.32	Other (please specify)	6.21			6.43
Morocco	6.11			6.33	Other (please specify)	6.22			6.44

7 Has your college entered into any contracts for the training of overseas students in vocationally related skills in discrete groups for overseas commercial/industrial organisations or their intermediaries:

Please tick box:

Yes	7.1		No	7.2	

8 (a) Would your college be willing to participate in follow-up work on overseas student marketing and recruitment activities.

Please tick box:

Yes	8.1		No	8.2	

(b) If Yes, please complete the box below:

College	Contact Name	Telephone number and extension

9 If your college does not actively recruit non-EU students. Why not?

Please state:

Yes		
	9.1	The college's strategic plan is totally focused on the home market
	9.2	Have already tried recruiting overseas unsuccessfully
	9.3	The geographical location of the college is perceived as a disincentive to international student recruitment
	9.4	Other recruitment activities take precedence
	9.5	Other (s)(please state)

10 Is there anything else you would like to add which may assist this research project:

Please return the completed questionnaire in the pre-paid envelope to:

John D Parnham
c/o The Association of Colleges
5th Floor
Centre Point
103 Oxford Street
LONDON WC1A 1DU

Thank you for completing this questionnaire.

APPENDIX 7.2 INTERVIEW GUIDE

NATIONAL SURVEY OF NON-EU INTERNATIONAL STUDENT RECRUITMENT

CASE STUDY COLLEGE VISITS

INTERVIEW SCHEDULE

College _____

Name _____

Job Title _____

Date _____

1 Would you like to give me an indication of your college's involvement in and commitment to international work?

Supplementary questions:

1.1 Did your college's involvement and commitment pre-date Incorporation?

1.2 If yes, has it increased in importance since Incorporation?

1.3 Has the quasi-market in further education increased the importance of international student recruitment?

2 During your time at the College, has it had to re-evaluate its commitment to international work in general?

Supplementary question:

2.1 During your time at the College, has it had to re-evaluate its commitment to international student recruitment?

3 How does the College's Governing Body monitor the Institution's international work?

Supplementary question:

3.1 Does the College's Governing Body set qualitative and quantitative targets for its international work?

4 Has international student recruitment assisted the College in preserving declining areas of work?

Supplementary question:

4.1 Has international student recruitment enabled the College to develop new curriculum areas?

5 Would you like to comment on which methods of course promotion you consider to be the most effective?

Supplementary question:

5.1 Would you like to comment on any methods of course promotion which you consider to have been particularly ineffective?

6 Can you describe the other types of "international work" with which your college is involved other than non-EU student recruitment to the UK?

7 Are there any features specific to your college which gives you a competitive edge over other FE colleges recruiting non-EU students?

Supplementary question:

7.1 Are there any specific features that a college must have, in your opinion, prior to embarking on international student recruitment?

8 How important do you feel that the "welfare package" which you offer students is?

Supplementary question:

8.1 Does your college offer scholarships to a quota of its international students?

9 How do you view the effectiveness of The British Council?

Supplementary questions:

9.1 How do you view the effectiveness of BASCELT?

9.2 How do you view the effectiveness of UKCOSA?

9.3 How do you view the effectiveness of IVETA?

10 Strictly confidentially, where do you see your college developing its international work in the future?

Supplementary questions:

10.1 Do you see your college competing primarily for students with British colleges?

10.2 Do you see your college competing primarily for students with international competitors?

11 What more would you like to see the AoC do to assist your college in its international work?

Supplementary questions:

11.1 What more would you like to see the DfEE do to assist your college in its international work?

11.2 What more would you like to see examining boards do to assist your college in its international work?

11.3 What more would you like to see other statutory bodies do to assist your college in its international work?

12 Are there any other opinions or views you would like to add which may assist in this research?

Documentary evidence

1 College's three –year strategic plan ❒

2 Marketing plan for international student recruitment ❒

3 Reports prepared for the Governing Body on international student recruitment, particularly the evaluation of international activities ❒

4 International student prospectus and promotional materials ❒

5 Results of any student satisfaction surveys for international students ❒

Interviews

1 Principal ❒

2 Senior Manager ❒

3 Student Welfare ❒

4 Chair ❒

5 Governor ❒

6 Other ❒